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ABSTRACT

The Pilot Training Project for personnel participating in Pilot State Dissemination Programs involved training of the three dissemination project staffs to carry out their dissemination functions. The program attempted to facilitate the use of tested educational research data by local educational agencies in their decision process. The staff members were trained in various aspects of need assessment, data retrieval, and information utilization. The training project utilized a training methodology based on a university extension model of information dissemination and utilization. The methodology consisted of meeting individual needs through a process of visitation with the project staffs in the working situation, presentation to them of relevant information, and involving the trainees in the educational process through various interactive modes. This report documents the training program and develops information that would be useful to future training programs of similar nature. This includes the historical and conceptual antecedents to the program; its organization, objectives, and methodology; and the observations and experiences of the training staff. Specifics of the program are dealt with in the appendices. An outline of subjects dealt with by the training project is as follows: 1. Initial exchange of project proposals, 2. Pre-training site visits, 3. Initial one-week training session, 4. Combined site visit and on-site training program, 5. Third site visits in preparation for final training program, and 6. Final three-day training program. (Author/DB)

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FINAL REPORT
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Contract No. OEC-0-70-4724 (508)

# PILOT TRAINING PROJECT FOR PERSONNEL PARTICIPATING IN PILOT STATE DISSEMINATION PROGRAMS

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June, 1972
U.S. DEPARTMENT OF
HEALTH, EDUCATION AND WELFARE
Office of Education

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Final Report

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Project Director - Charles H. Koelling

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University of Missouri

Columbia, Missouri

June, 1972

The research reported herein was performed pursuant to a contract with the Office of Education, U.S. Department of Health, Education, and Welfare. Contractors undertaking such projects under government sponsorship are encouraged to express freely their professional judgment in the conduct of the project. Points of view or opinions stated do not, therefore, necessarily represent official Office of Education position or policy.

U.S. DEPARTMENT OF HEALTH

EDUCATION, AND WELFARE

Office of Education

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The training project members express their thanks to the participants in the pilot training program for their hospitality, sincerity, and interest. The high quality of these people and their ambition aided greatly the success of this program. The participants from the three states should be applauded for the monumental task they undertook in organizing the State Dissemination Projects. It was a pleasure to work with such courageous people in this pioneering endeavor.

The director and associate director sincerely thank all members of the training team who gave their time and sincere interest to organize and assist in training the members of the State Dissemination Projects.

Charles H. Koelling

Carl C. Fehrle

June, 1972

University of Missouri - Columbia

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# I. SUMMARY

The Pilot Training Project for personnel participating in Pilot State Dissemination Programs involved training of the three dissemination project staffs to carry out their dissemination functions. The Pilot State Training Dissemination Program attempted to facilitate the use of tested educational research data by local educational agencies in their decision process. The staff members were trained in various aspects of need assessment, data retrieval, and information utilization. The training project utilized a training methodology based on a university extension model of information dissemination and utilization. The methodology consisted of meeting individual needs through a process of visitation with the project staffs in the working situation, presentation to them of relevant information, and involving the trainees in the educational process through various interactive modes. This report documents the training program and develops information that would be useful to future training programs of similar nature. This includes the historical and conceptual antecedents to the program; its organization, objectives, and methodology; and the observations and experiences of the training staff. Specifics of the program are dealt with in the appendices. Of particular interest is an outline of subjects dealt with by the training project.

Outline of the Project:

1. Initial exchange of project proposals -
   Meeting of project leaders, evaluation team, and training team with O. E. personnel.
2. Pre-training site visits
3. Initial one week training session
4. Combined site visit and on site training program
5. Third site visits in preparation for final training program
6. Final three day training program

# II. INTRODUCTION

## A. Ideological Background

Several prominent factors seem to underlie the development of the Pilot State Dissemination program. Most prominent among these is the current concept of education that views institutions of education as inadequate and in need of change. Research literature has responded

with a great deal of new information about change processes. Many of the examples used in the change literature come from the field of agriculture where land grant university extension programs have been facilitating change for many years. ERIC (Educational Resources and Information Centers) has taken great strides in collecting a comprehensive file of educational resources. The Pilot State Dissemination Program has established three state projects with some similarity to university extension organizations, which provide educational data and assistance for change to local schools.

The educational concepts responsible for the conviction that schools need to change will not be dealt with in detail. It is more important to ask why newer educational concepts are not implemented in educational institutions. One obvious answer is that there is a communication gap between the concepts and the reality of the situation. This communication gap can be bridged in one way by bringing data to the schools on an interpersonal level. One idea commonly held in education is that because decisions are often made with an inadequate data base, the decisions could then be improved by providing, to the decision maker, information that is relevant to his situation.

Research pertaining to change develops the processes by which change in education is to be brought about. A large proportion of this research deals with change processes in agriculture. In a review of 4,000 studies in change relating to education by Havelock, 12.8% of the studies reviewed dealt with agriculture. References to agricultural change are fairly common in literature concerning change processes. Reference to agriculture is important for the study of change processes because of the existence of the Cooperative Extension Service, the oldest, most elaborate, and most ambitious effort to institutionalize dissemination and utilization of knowledge for the purpose of change (Havelock, 1969, 3-33). There are other such institutions but they are not nearly so well established.

One of the goals of the Pilot State Dissemination Programs seems to be to study the feasibility of developing a similar process for education. There are, however, several differences which could affect this development.

Traditional cooperative extension deals mostly with informing an individual farmer about a tangible product that will increase his profit if it is utilized. In education, innovations involve research information or new concepts and only rarely new products. Educational innovations most frequently require the cooperation of complex organizations rather than of individuals. Schools are not profit organizations. It is rare enough to find an educational innovation that even reduces costs. Changes seem to be successful when they stimulate community, school staff, or student feelings of satisfaction rather than profits. Change in education involves abstracts such as concepts, organizations, and satisfaction.

The cooperative extension approach does have several strengths

that would seem to accommodate these differences. It is an organized effort. It allows for the coordinated utilization of specialists in communication, research, and research utilization. Through the use of the county agent it takes into account the human aspects of information assimilation such as the importance of rapport, social context, and social reinforcement.

In cooperative extension programs the county agent who speaks directly with the farmers also has direct ties with land grant college research programs. In education a national system of research data collection (ERIC) can provide collection of current resources. These data are available in a form suitable for high speed automatic data searches. Because of the nature and state of the science of education, there is some question about the adequacy of these data to solve every educational problem; but there can be no doubt that they represent an important resource for information concerning educational problems. If the experience of agriculture is to be taken seriously, then the mere existence of this resource is not enough to assure that it will be used to the fullest extent. The research must be interpreted and adapted to the local situation before it can be assimilated locally. Possible, an educational field agent, with duties similar to the county agent, could be used in this capacity.

The statements made thus far are largely conjectural. The purpose of the Pilot State Dissemination Program, as funded by the United States Office of Education (USOE), was to develop in three states, on a trial basis, educational projects, a systematized procedure for assisting educators to identify problems and concerns, collect relevant information relating to these concerns, and provide information in a manner calculated to provide a more rational basis for decision making. This would provide data and experience for the question of the feasibility of such projects. These projects served only a representative sample of persons in need of such a service. The three pilot programs were, in addition, provided with a high degree of flexibility to enable adaptation and experimentation. Occasionally this flexibility involved an indefiniteness which gave rise to conflict over varying interpretations of roles and objectives. This flexibility, if not carefully documented and reported in relation to relative success according to identified differentiated objectives, will no doubt hinder the interpretation of the results of the program.

## B. Description of the Dissemination Program

The Pilot State Dissemination Program resulted in the development of five separate projects in separate programs. One developed a training program, and one was the evaluation component. The three dissemination projects entailed organizations within the state education agency (SEA) with at least two target areas identified in each state. Both the training and evaluation projects entailed organizations within a university. The dissemination organizations utilized library resources and specialists supplied by the SEA. State libraries and local university resources were used occasionally. Each of these

organizations consisted of about seven staff members with primary responsibility to the SEA. The staff included:

1. A director, a member of the SEA staff, whose duty it was to develop organizational structure, delegate responsibility, and coordinate functions.
2. Two or three reference and retrieval office staff who were to catalogue materials and provide information requested by the field agents. They were to make full use of automated searches of ERIC materials or related library resources.
3. Two or three field agents were located physically apart from the SEA in target school areas with an administrative relationship both to the SEA and to the target areas to which they were assigned. Their duty was to provide change agent or technical assistance support to local schools.

The general procedure of the dissemination organization was to solicit requests for information or assistance from local schools; to research these problem areas in ERIC and associated resources; to return to the local schools with ERIC abstracts or other pertinent information; and, finally, to assist the client in the assimilation or possible utilization of this information.

The evaluation component, located at Columbia University, had responsibility for evaluation of both the operational activities in the states and the training program. Therefore, the training team restricted its evaluative efforts to those required to carry out its function.

It is very important that a reader of this document recognize the limitations of this alone if he wishes to obtain a comprehensive picture of the entire project operation. This document, final project reports from the states and the final report from the evaluation team are all required to view the entire project from the various vantage points.

## III. THE TRAINING PROJECT

### A. Description

The major thrust of the training project consisted of the development of three training programs of approximately one week in length developed for the staff of the various state pilot dissemination projects. USOE personnel, SEA personnel, and other personnel having a relation to the project were included whenever possible. Appendix A contains a list of persons participating. These programs included directed sessions and activities conducted by the training staff and resource persons selected for their knowledge, competence, and training ability. The first and last training programs were held at a central location while the second training program was individualized and held locally in each state. Both the content and process of the training program were developed to meet the needs of the three project

staffs as expressed on especially developed questionnaires and by unsolicited comments, or as developed through direct observation of the local situation during work site visits. These observations included a careful study of the local situation and a study of the goals as stated in individual state projects. In addition to the three training programs, three site visits were scheduled for each state project. These site visits involved two to five training personnel visiting, observing and counseling each project staff member. The staff member was in his working situation whenever possible. Training personnel concentrated their attention on areas related to their special competence. Various trainers were also available at other times for direct communication with project staff trainees during the course of the program.

Two part-time administrators, one of whom served in a training capacity, along with four part-time trainers provided the major effort and continuity of the training program. In addition, many special resource people were utilized in the program. (See Appendix A.) The administrators planned and coordinated the project with the assistance of the training staff and an advisory committee representing the various areas of expertise of the University of Missouri. The training program included many adjustments in structure and content in an attempt to meet the varying needs of the trainees.

## B. Trainees

The trainees included all the staff of various Pilot State Dissemination Projects: project directors, retrieval personnel, field agents, secretaries, and in a few cases consultants from SEA. The project directors and field agents were consistently well-educated with master's or doctorates in education and had extensive experience in education including administration and teaching. The level of education of the retrieval staff varied from a high school diploma to a master's degree in college. Though they initially indicated, based on their response to a questionnaire, a lack of experience in library science, computer fields, counseling, and salesmanship, skills in these areas were developed. Enthusiasm for the project seemed consistently high. Much concern was placed by the state project staffs on practical applications of knowledge.

## C. Trainers

At the outset it was recognized that the training program would be formidable undertaking. This recognition rested on the following points:

1. The variety of specialized but component tasks involved in the projects requiring differentiated knowledge, understanding and skills, but at the same time requiring some common basis for connecting these together in a viable,

working unit involving similar knowledge, understanding and goals.

2. A wide variety of backgrounds of trainees, geographic, educational and experiential. This was viewed as particularly significant in the absence of a rather extensive pre-service base of education dealing specifically with information dissemination and utilization.
3. Time and geographic factors coupled with the necessity to weave training activities into a new program with operational demands on staff.
4. Differing program philosophies and operating procedures among the three states.
5. The absence of any clear cut training models, modes or designs (if there ever is such a thing as a prescriptive training plan which can deal effectively with these kind of complicated phenomena) to utilize as a dependable approach to the problems mentioned above.

Therefore, it became necessary to assemble a basic team of trainers who, by education and experience in related process areas of school operation, retrieval, dissemination and utilization systems could attempt to build and conduct a training program requisite to the task.

The basic team was constituted as follows:

1. Three staff members with extensive education and experience in education and in school work.
   a. One of these had considerable education and experience in educational administration at both public school and University levels as well as experience in program design and implementation for practicing educators.
   b. One of these three had considerable education and experience in elementary school teaching and administration in geographic settings ranging from a rural school to an inner city school as well as college teaching experience and considerable successful experience in conducting in-service education for teachers.
   c. The other staff member had public school experience and experience as Director of Research in State Department of Education including extensive, recent experience with computerized ERIC and CIJE materials.

2. Three staff members with extensive education and experience in cooperative extension.
   a. One staff member had experience as a county extension director, district extension director and special consultant to the Vice President

for Extension in addition to his advanced work in Adult Education.

b. One staff member had experience as a county agent, director of training for Extension and departmental chairman in a Univeristy department of Extension Education in addition to advanced work in adult education.

c. One staff member had experience as a secondary school teacher, a county community development specialist, a county extension director and recent, extensive experience in managing a Technical Referral Center having some similarity to the projects being undertaken here, but operating through University Extension and dealing with business and industry primarily.

This basic training team was supplemented where deemed appropriate, by specialized personnel possessing particular kinds of content or methodological expertise requisite to meeting trainee needs as discovered in the evolution of the training program.

The training team drew heavily on the accumulated experience of Cooperative Extension and more recent experience of the University of Missouri Extension System, the first in the nation to combine cooperative and general extension into a unified system.

This extension experience has been applied on two levels in this training program. On the level of the dissemination organization, the members of the training staff were careful to interpret and explain various aspects of that organization in terms of their knowledge of similar aspects of existing extension systems. On a different level, the training staff behaved as change agents in the manner of extension staff. For the most part, they attempted to serve as examples as well as an authority in the change process.

Training staff members (See Appendix A) were selected for this project on the basis of their knowledge, experience, skills, and attitudes. They were knowledgeable in a subject relevant to this project. The trainers' experiences included various aspects of the knowledge dissemination and utilization process. For example:

Establishing relationships
Diagnosing problems
Searching for solutions
Planning and adaptation
Communication, collaboration, and implementation
Evaluation
Development of independence

The experience of the Extension Division of the University of Missouri was particularly relevant to the Pilot State Dissemination Program because of their similarity of structure. The University of Missouri-Columbia operates a technical referral center that involves

research system similar to the Pilot State Dissemination Program. The technical reference center is different in that: (1) its subject emphasis is engineering technology rather than education; (2) it involves greater breadth of non-computerized data; (3) it utilizes manual rather than computer searches; and (4) it uses more consultants and other human resources close to relevant research. The services of the technical referral center are extended to business and industry through the area extension specialists who in turn are responsible for the personal services to clients similar to those which the field agents were supposed to provide to the schools in the Pilot program.

Use was also made of the University's library resources and the capability of the Missouri State Department of Education's Research facility to do high speed computer searches of ERIC and CIJE data similar to that carried out by the various state dissemination projects.

The skills of the training staff included the ability to provide information and resources relating to the dissemination process; to demonstrate the skills related to that experience; and to facilitate the types of communication and support that would be conducive to trainee development. Training staff members were all concerned about the development ot the responsibility and independence of the project staff. Their counseling skills also included the ability to help clarify roles and relationships. The members of the training staff were enthusiastic and empathetic with the project staff's situations. The trainers, through the contribution of their own special competence, were able to provide a training program which they felt generally covered the areas of interest and needs of the three Pilot Programs.

## D. Objectives of the Project

The objectives listed here are overall goals actually utilized by the training staff. These objectives serve as a summary of trainer behavior rather than indicating objectives stated prior to the training.

1. Determine the job need of the three project staffs by a comparison of staff behaviors in relation to expected behaviors derived from an analysis of the local situation with reference to:
   a. Literature on change
   b. Extension type procedures
   c. Operation of a retrieval center
   d. Library research procedures
   e. Goals of USOE
   f. Goals of SEA
   g. Project proposals
   h. Local organizational structure
   i. Individual characteristics and personal objectives

2. Satisfy the job needs of the project staff by changing attitudes, providing information and developing skills

which enable the individual to perform his job and help himself to satisfy his own job needs. This objective is listed as the overall objective of the project proposal. This goal was considered met when the trainee demonstrated competency in all subject areas relevant to his job role. Subject areas within the scope of this training project are outlined in the first training program.

3. Investigate and utilize all information and training resources relating to the job needs of the project staff.

4. Maximize the training within the limitations of budget and time including the limitation of one week as the length of any training session.

## E. Training Schema

The structure of the training program was based on the experience of the training staff with the University of Missouri Extension programs. The program was found to be consistent with the dissemination and utilization of knowledge model developed by Ronald G. Havelock in A Guide To Innovation In Education. A basic outline of the approach of program is similar to the one developed in Appendix D, Part I, Dissemination and Utilization of Knowledge. Various parts of the training plan correspond to recognized steps of the change process including situation analysis, research, adaptation, implementation, and evaluation.

This approach was utilized because of its methodological consistancy with the operation of the Pilot State Porgrams themselves: this becomes clear when it is recognized that relevancy of information requires situation analysis of collection of information involves research, application of information involves adoption to accommodate situations variables, the entire process is to no avail without implementation (or a first decision making) and the relative worth of decisions cannot be determined without some kind of evaluation--all part of information dissemination and utilization and useful in training as well as operation.

The first step, situation analysis, involved a comparison of the project staffs' performance of their tasks, and a discussion of the situation with the trainee. The training staff then concentrated on the problems which arose as barriers to task performance and what the project staff needed to overcome these problems.

Task demands were determined from a number of sources including the trainers' knowledge of the demands of similar tasks. The state project proposals were analyzed along with the stated objectives of the SEA. Additional task demands of the local situation were made by director observation. Site visits provided the trainers the opportunity to observe the trainee performing his task in the context of local demands. During the site visits and training sessions,

issues, and concerns of the trainees were discovered by discussion and visitation with the trainees. Meetings were scheduled with the staff of each of the state projects to obtain additional information on operations and problems. Several questionnaires were developed by the trainers to help them assess the needs of the trainees. Needs were assessed in terms of getting the project staff from where they were to where they were better able to meet their objectives.

The second step, research, referred to the fact that the information needed by the trainee had to be available in a form that was suitable for communication. Primary consideration was the availability of a data base or resource pool which included procedures for getting at relevant information. Lists of resource persons and materials were prepared. Answering this problem involved a continuous process of comparing accumulated resources with actual needs. Many training team meetings were held for this purpose. Training materials relevant to this subject currently available were analyzed for their adequacy. Additional materials, including texts and audio visuals, were made available to the trainees on a loan basis.

The third step of the change process involved the adaptation of information acquired in the research step. The mere communication of information was not sufficient to insure its utilization. There are many conceptual, psychological and sociological aspects which affect the utilization of information. The material presented had to be appropriate to the situation before it was optimumly meaningful to the trainees. The following procedures were included in the training programs to enhance its appropriateness:

1. Adaptation of Research Data tends to be devoloped in a controlled atmosphere. Application required knowledge of how a local situation would affect utilization of research data.

2. Tentative programs were sent to the project directors. Training staff discussed the program item by item with them when possible.

3. Training staff utilized data from similar experiences in extension programs.

4. Resource people were sent state proposals and other background materials. When possible, they were briefed on their subject responsibility. During the Third Training Program, speakers worked on problems submitted in advance by the trainees.

5. Actual situations were critiqued through the use of case studies and other materials developed by project staff.

6. General information was presented and later reinforced in discussion and work sessions. Information was

presented by means of lectures, audio visuals, texts, and other literary references. Activity sessions included field trips, role playing situations, case studies, project staff presentation and evaluation and actual on-the-job sessions.

7. Programs were individualized for respective concerns. Materials were separated by role when relevant.

8. Continuous feedback was encouraged and interpretations of this were utilized in formulating the continuing stages of the training project.

9. Project staff members were encouraged to share their experiences.

The fourth step of the change process, implementation, was necessary because information acquired by the trainee was of little benefit if not followed by action. Several methods were used by the training staff to develop appropriate patterns of behavior.

1. During the training sessions role playing situations were devised.

2. Demonstrations of successful procedures were provided through an emphasis on case studies and trainee sharing of experiences.

3. During the work site visits the training team:
   a. Provided reinforcement for appropriate behaviors.
   b. Counseled the project staff as it seemed appropriate.
   c. Observed behavioral changes resulting from the training sessions.

4. Project directors were encouraged to:
   a. Monitor staff behavior.
   b. Provide reinforcement and support for appropriate behaviors.
   c. Develop interstaff communications through staff conferences and visitations.

5. Examples of materials, such as office forms, were provided to facilitate the trainees' efforts.

With regard to the last step of the change process, evaluation, the primary concern of the training staff was that the dissemination projects functioned effectively; that is, that they conceptualized and established goals and ways of functioning to carry them out and were making progress in the way of knowledge, attitudes and skills requisite to operational effectiveness. Project staff behavior was deemed appropriate if it was conducive to this effectiveness. Training

team observations on the work sites, reviews of project status reports, and reviews of evaluation questionnaires produced by the training and evaluation teams provided the raw data for an evaluation of effectiveness.

## F. Training Programs In Operation

### 1. The Advisory Committee:

The first step was to organize an advisory committee (Appendix A) which was composed of University of Missouri and Missouri State Department personnel. This group included people who had expertise in different areas of programmatic activities deemed to be relevant in the process of information dissemination and utilization.

### 2. Organizational Meeting:

The second step was for each member of the three State Dissemination Projects, the evaluation team, and the training team to become informed of the objectives of each other's proposals (See Appendix B for the proposal from University of Missouri-Columbia.) To accomplish this, it was recommended that each project director send copies of his proposal to the other states, the evaluation team, and the training team. After these had been received, it was recommended that the project directors (or other personnel well informed in the objectives of the project), the evaluation team, the training team leaders, and personnel from the U. S. Office of Education meet at the University of Missouri-Columbia, August 12 and 13, 1970.

At this meeting each participant was to be prepared to present his project, and the other attendants at this two day meeting were to probe, question, and recommend for clarification and improvement. Three pilot State Dissemination Projects were represented by two members from South Carolina, two from Oregon, and one from Utah. Three participants from the evaluation component, two from the University of Missouri-Columbia training team, and two from the USOE were in attendance. At this time the three states had selected their project directors; Utah had employed its three field agents; and South Carolina had employed two of its retrieval staff.

Since this was a pilot program, a general discussion on the type of personnel to be employed was of importance. The following was contributed and recorded by the participants:

a. Recruiting Factors

1. Openness--ability to relate to others
2. Pro-active--predisposed to act
3. Creative (Does he have ideas?)
4. Catalytic
5. Supportive/developmental (Rather than directive)
6. Low personal ego needs

7. Tolerance for marginality
8. Educational experience--preferable in more than one role

A discussion on the responsibilities of the field agents was conducted. The following was recorded:

a. Field Agents:

| Skills | Functions |
|---|---|
| Establishing relations with clients | Assist clients in:<br>Diagnosis of needs, problems<br>Awareness of resources, alternative solutions<br>Evaluation of relevance of alternatives<br>Establishing change systems |

Some of the training requirements were discussed. From this, the following was recorded:

a. Potential Trainees

1. Project Managers
2. Retrieval staff
3. Field agents
4. SEA consultants, staff

b. Training Requirements

1. Individual skill building
2. Team training development
3. Teams which can assist SEAs to be "self-renewing" rather than just "adopters"

c. Issues

1. On campus vs. site training
2. Courses vs. independent study
3. Available resources

During this organizational meeting it was recommended that open communication (See Appendix C) would be maintained by each component seeing that the Project Directors, evaluation team, training team, and the USOE received a copy of all correspondence. The correspondence that would not directly relate to the receiver could be immediately discarded. Agreement was made that confidential decisions would not be disseminated.

On the second day the evaluation team, training team, and the USOE established themselves in separate areas of the room. The three project directors or representatives met with each group for an allotted amount of time to clear any misunderstandings and to make recommendations. At this time the training administrators

discussed tentative plans for making the first site visits in the states and gave each state a tentative date for doing so.

3. First Site Visits:

The employment of personnel for the three Pilot State Dissemination groups was at different stages. During the site visits, the following people were available:

a. Utah had employed its complete staff consisting of project director, three field agents, and retrieval person.

b. South Carolina had its project director, chief supervisor, information analyst, and chief secretary.

c. Oregon had its project director and had employed one member of the retrieval staff, but he had not assumed his responsibilities.

It should be noted that valuable individual training was conducted on the site visits. The trainees had problems and questions and the site visitors of the training team took care of them immediately. Many of the trainees expressed sincere appreciation.

The first site visits helped the training staff gain some insights into the philosophy and direction of the project and to identify needs even though a limited number of personnel had been employed. These site visits were less productive than they might have been if all states had full staff compliments. In spite of limitations it was necessary for the training session to be designed and held in order for the project to move ahead on schedule.

4. Planning The First Training Program:

The first training program had been tentatively set for the second week of October, but it later had to be changed to the third week to permit adequate planning time and organization within the three State Pilot Dissemination Projects.

Following the Organizational Meeting the training administrators continued their plans for the first training session by:

a. Reviewing the relevant literature

b. Designing a questionnaire to be submitted to the trainees

c. Selecting literature pertinent to the training needs

d. Sending the trainees selected books prior to

the first training session and asking the trainees to become familiar with certain selections

e. Asking that each trainee be able to identify his role and show how it related to the entire project

The first training program (See Appendix D) was based on the Organizational Meeting in Columbia, Missouri, August 12 and 13, and the first site visits. In addition to this there was a review of the literature, consultation with the advisory committee, and individual conferences with key people knowledgeable in utilization and dissemination and other service training programs. A questionnaire (Appendix E) was developed and sent to the retrieval people. From these sources the first training program of five days duration developed.

The tentative programs were sent to the project directors, evaluation team, and USOE staff who were invited to make recommendations. After these recommendations were received, the training team and advisory committees met to make the recommended changes. The revised programs for the first training program were sent to each trainee.

To give the discussion leaders and other participants at the first training session the proper background for this session, the project director and associate director personally contacted each person. A general overview was given and the state proposals were made available for individual reading. Several of the speakers asked for a copy of the reference books on information utilization and dissemination which were on the recommended list for the training session. To better prepare the presentations, two of the speakers asked about the backgrounds of the individual trainees. Since this was a pilot training program, all were highly interested that it be a successful one.

The first training session was designed to deal with specific problems and concerns of each of the specialized components (project directors, retrieval staff, and field agents) as well as general and special concerns appropriate to all staff members. The first to be considered was the general needs of all the participants. They were:

a. Introduction to project purposes

b. Participation training--introduction to group problem solving

c. Motivation

d. Introduction to change theory

e. Learning to function as a team

f. Seeing an Industrial Retrieval Center In operation

g. Participation in a field trip to a computer center utilizing ERIC and CIJE

h. Learning the importance of public relations

i. Recognizing trends in educational technology

The training team provided training for field agents and project directors in:

a. Initiating and maintaining contact with school personnel

b. Interviewing for problem identification

c. Recognizing the importance of adequate communication

d. The process of innovation

e. Getting an overview of ERIC

f. Understanding educational analysis and problem solving

g. Understanding conflict management

h. Normative world of a field agent

The retrieval staff and project directors needed immediate information on establishing records and other office procedures. They were given detailed instruction in:

a. Building a Data Bank

b. Looking at ERIC through one Clearinghouse

c. Interrogation of the ERIC system

d. Locating and retrieving information outside of ERIC

e. Operational administration in a retrieval center

f. Tapping human resources

5. Additional Dimensions Interwoven Into First Training Program:

Two additional dimensions were planned to take place simultaneously with a substantive portion of the first training program. The first of these related to a concern on the part of the trainers that information

discussed by the staff members in their respective sessions be incorporated as rapidly as possible into the consideration of the respective state teams. Actually, the purpose was to enhance communication among the retrieval staff, field agents, and project director of each state and see how the information they had acquired during the day would be utilized by their project. Secondly, this was to reinforce the idea of the team approach so they would view themselves as a state team rather than a retrieval specialist, a field agent, or a director as such. This was provided for in the training program by scheduling a meeting at the end of each day for one hour during which state teams could meet and receive input from their state project members and directors concerning their educational activities of that day. To learn in what manner states were going to utilize the information, each project director had a scheduled time the next morning to "feed back" the pertinent points to the entire training group.

The second of these longitudinal dimensions, and the one which proved to be more effective, involved the building of a simulated program (Appendix F) entailing interrogation, identification, retrieval, and reporting activity. Three school administrators were recruited to be interviewed by three field agents. (This interview was videotaped.) After the educational problems were identified by the field agents and the school administrators, the written request was submitted to the respective retrieval personnel. The retrieval personnel did hand searches of references and then submitted the problem to the retrieval person at the State Department of Education in Jefferson City to be given the QUERY search.

After the information was compiled and studied, the field agent met with the school administrators to report to them on the investigations pertaining to their problems and plans were outlined. This experience provided an actual working situation and observation experience for both field agents and retrieval staff. Also, it provided an initial opportunity for all to have a practical experience.

The training team had made arrangements with the educational librarian to have a reading room available for the trainees where they could explore the selected references and check them out. Each project director was supplied a cassette tape recorder. Cassettes on information and utilization and dissemination were placed in this reading room to be used by all trainees. (Appendix G.)

When making the survey for additional ideas on the first training program, it was recommended that a "film festival" be held on one of the evenings. This was scheduled for Tuesday night (Appendix G). Two of the trainees availed themselves of this opportunity.

6. Critique Of The First Training Program:

The week was packed with numerous activities and experiences to facilitate the trainees in obtaining adequate knowledge in highly essential areas. The training team presented the following comments for consideration when organizing a similar training program.

a. The trainees needed more time to get acquainted before launching into the body of the training program. Three of the trainees had just been hired.

b. Time should have been taken for the states to review their training proposals for all the trainees.

c. The training program started at 8:00 a.m. and was to run to 5:00 p.m. Activities had been planned for three of the evenings. This proved to be too compactly scheduled for people new on the job and for so many new technical areas.

d. The program contained too much to be covered in too short of a time. It was impossible for the trainees to completely grasp all points. During later site visits and training programs, it was evident that the trainees were just becoming cognizant of ideas that were introduced and presented during the first training program.

e. The trainees did not have time to read the materials sent to them. (Appendix H.) Since this material was not familiar to the trainees, they could not move through the material as rapidly nor as completely as planned (Appendix I).

f. Because the state proposals differed, it was was necessary to present too wide a range of information and activities during the first training session in order to expose the trainees to the complexities, as well as the operational and minute, procedures.

g. Considering all these limitations a significant amount of materials, problems, issues and concerns was covered which was later found to be central to the needs of dissemination personnel.

The first training program should be of a month's duration so that trainees would be prepared to be away from home for more than three days, slow the pace of presentations, and allow more time for interaction and involvement of the trainees. This would permit the trainees adequate time to be held responsible for definite assigned work and accomplishments.

The training team should plan a flexible schedule. Even after the first couple days the training team had to meet and condense an already crowded program because some of the trainees had to return to their states earlier than the Training Team had planned.

Comments received indicated that the trainees' expectations were too high to be accomplished in five days.

Trainees' Evaluations:

The training team and advisory committee met several times and designed an evaluation form (Appendix J) to be sent to all trainees. From the results, the following statements are made:

The training activities which were designated as having given "quite a bit" or a "great deal" of help were those which:

a. Prepared trainees to describe what the project was to do in their individual states.

b. Developed teamwork within the state groups.

c. Would have provided for the state meetings at the close of each day had time permitted, to transfer the knowledge gained to others on their team and to clarify any conflicting ideas among role responsibilities.

d. Provided for the tour and the information received in the tour of the computer center at Jefferson City.

e. Provided the opportunity to have the field agent interview an administrator, to designate descriptors, submit the question to our retrieval specialist to investigate other resources in order to answer the question, prepare the material for the administrator, and conduct the conference with the adminstrator.

The training activities which were designated as having been of "some" or "quite a bit" of help were those which provided:

a. Aid in describing the steps in problem solving.

b. Encouraged participants to extend their abilities to communicate orally and in written form.

c. Aided trainees in identifying obstructions and deterents to the execution of their programs.

The training activities which were designated as having been of "no help" or "some help" were those which were designed to:

a. Provide within the time limitation the widest possible range of experiences within those available topics directly or indirectly related to present any future work of the dissemination teams.

b. Assist each training member so he could describe the essential elements in the change process.

c. Assist the trainee in developing rapport with individuals and to engage effectively in group processes.

d. Assist the trainees in establishing (forming) their own realistic and obtainable goals.

Check Sheet Completed By The Trainees:

A check sheet was provided to the project directors, retrieval people, and the field agents. They indicated that:

The training program for the project directors was of some value in the following areas:

a. Identifying sources of information other than ERIC.

b. Recognizing that additional consultant expertise is available outside the State Department.

c. Organizing a system to obtain consultant expertise outside your State Department.

d. Learning to effectively catalog and cross reference materials of all kinds into the data system.

e. Identifying and developing means for using consultants which include identifying expertise and competence of consultants and also the means for injecting these data into the system for appropriate use.

Project Director's Written Evaluation:

To provide "feed back" information to the Training Team so adjustments could be made in the training program, the project directors wrote daily critiques of the training program. In general, the comments were most complimentary, but as future programs are planned the following should be considered:

a. Sessions were too long; too crowded; and too many topics.

b. More individual involvement favored; desired discussion; role playing; interaction sessions.

c. Dislike the "lecture style" program.

d. Needed more time for small (job likeness for all states) group meetings.

e. The simulated "field agents and school superintendent" programs were very valuable.

f. The retrieval presentations were very good.

g. The participation training the first day was very good; but needed more time to develop ideas.

h. There was a need for additional practical experience.

i. The experiences on Thursday with discussion leaders was most valuable. (Sessions on "Ways At Looking At A School", "Problem Solving In The Public School Environment", "Conflict Management" and "Life As A Field Agent".)

j. The terms such as ERIC, CIJE, and QUERY should have been explained.

k. The training program provided for clarification of an overall picture of the project.

l. Needed more opportunity to attend the sessions planned for the other groups.

m. The program needed more flexible scheduling.

Written Comments By The Trainees:

In addition to checking the sheets, the trainees were encouraged to make comments. There were a limited number of comments on questions

1-12, but all were recorded (Appendix K). The trainees wrote comments for question 13 which was: Given the time limitations of the first training session and your present knowledge of the three state programs, what would you have left out and what would you have put in its place (a) for the benefit of the group? (b) for the benefit of yourself in your state role? In general many of these comments were similar to the ones already listed.

7. Major Departure From Original Training Plan:

During the first training program the directors of each of the state pilot projects, USOE personnel, members of the evaluation component, and representatives of the training team assembled to discuss their views regarding future training dimensions. At that meeting there was a consensus of opinion that among other things, the experiences in the first training session with personnel from the various states clearly indicated philosophic and operational differences among the projects. Therefore, it was decided that if at all possible the second training session for each of the states should be held on the site, in the respective states, in order to deal differentially with the special thrusts, problems and concerns of the personnel in relation to the operation of their respective programs. In recognition of this need, the training team, in consultation with USOE, made the decision to implement this strategy for the second training program.

In two of the states, South Carolina and Oregon, it was decided to combine the second site visit with the second training program. The strategy employed was problem identification and problem solving strategy, selected for three reasons:

a. The programs would have been in operation for a substantial amount of time prior to the second site visit and training porgram.

b. It would be difficult to second guess the kinds of issues, problems, and concerns that would be related to the "readiness" stage for training processes very much in advance of the training activities if they were to be related carefully to the states program development at that point.

c. The problem solving approach was justified to be more appropriate to dealing with specific kinds of activities having indigenous situational variables where the intended result was action, examination of action, and action alternatives based upon examination and rational discourse.

The plan for the two states was quite simple, but involved a fair amount of risk on the part of the training team. This risk involved:

a. The possibility of encountering educational needs to which immediate attention should be given, but with

which this training team was not prepared to effectively deal.

b. The possibility of the program becoming a gripe session, a glorified bull session, or both.

c. The possibility that trainees might become very defensive when their own programming techniques were dealt with, thus reducing the opportunity for educational progress.

d. The possibility that trainees would be reluctant to put their real problems on the table.

The plan for minimizing these risks involved:

a. As nearly as possible identifying the broad areas of major concerns by communication with the states.

b. The selection of training personnel for each state who would be most likely to be able to deal with the specifics in the broad areas of concern previously identified.

c. Providing a program structure for each state after the site visits and after consultation with all personnel in the context of their operational frameworks.

d. Approaching the training session with a "helping attitude"; that is, with the goal of assisting the trainees to analyze what they were doing and how they were doing it, raising questions and offering constructive criticism relating to these activities and providing suggested conceptual and operational alternatives.

The particular strategy employed in each of these two states was for the training team to come together with the project director on the evening preceding the scheduling of the training program and following the site visits for the purpose of building the specific program for the following day. (It should be mentioned that a great deal of informal training on a one-to-one basis took place during the site visits and that some trainees saw this as being a very valuable element in the training process.) At that time the previously discussed general areas of concern were narrowed down and the specific topics and methodology for each topic was established. The training programs in these two states then began on the following morning. For the specific outline of the training programs see Appendix L.

For the second site visits and training sessions in Utah it became necessary, due to reasons of scheduling, for the site visits to be separated. However, essentially the same procedure was involved; that is, the identification of particular concerns and issues in the Utah

program and subsequently building a program designed to assist the personnel in the Utah project to deal with these issues.

8. Critique Of The Second Training Program:

Trainees:

There was almost unanimous agreement among the trainees that the individualization of the second training program in the respective states was a good decision; that is, they felt, that the individualization of the programs in their state was more helpful at that stage of their development than a general program for all states personnel would have been. (See Appendix M for detailed responses.) Some staff expressed no opinion on this issue since they had not attended the first training session. The other main concern expressed relating to this issue dealt with the possible alternative of gaining greater specialization in their particular component activity by a greater amount of time being devoted to their specialty or in interaction with persons serving the same specialized function in the other states. This is an issue which is a substantial one to be constantly dealt with in training program design in the context of time, resources, and administrative structures.

Secondly, the reaction of the trainees to the content of the Second Site Visits and Training Program (these were in effect all training in a sense) was favorable (see Appendix M). Among the items reported by the trainees as being beneficial results of the on-site training activities were the following:

a. The conceptualization of the multiple components in the program as one system with differentiated functions.

b. Greater awareness of the need for communication among project staff and plans for the institution of procedures to enhance this communication.

c. A higher level of skill and insight into carrying out their specific, programmatic functions.

d. Greater awareness of the need for follow through.

e. Recognition of the need to deal with priorities in the management of their time and effort.

f. Greater sensitivity to the matter of "role" delineation, both from the point of view of specifying relative roles in the organizational structure and, more particularly, the recognition of the differentiated roles played by a given individual with different situational variables confronting him.

g. More insight and skill in dealing with the problem solving process, probing beyond a statement of solution or symptoms to problems and moving from problems to alternative solutions.

h. A better understanding of the relationships of the project to the state education agency and ways of utilizing, more effectively, the expertise in the state educational agency.

i. The trainees reported that they felt their major problems and concerns were pinpointed by the training staff and dealt with effectively. In general, the comments pointed toward a feeling of trust on the part of the trainees toward the trainers, and a recognition of the expertise of the training team, and a feeling that the training program was dedicated to helping them deal with their problems and their situation.

j. No major complaints or criticisms were reported by the trainees.

Training Staff:

a. In general, the training staff was quite pleased with the development of the projects in the respective states in the few short months since the first training session.

b. The training staff felt that the on site, problem solving approach was very appropriate for the second training session and fulfilled the kind of purposes envisioned when the decision was made to conduct the session in this manner.

c. Members of the training staff felt thay had made some valuable input into the programs of each of the states to assist them to move forward; particularly in the following areas:

1. Improve communications
2. Follow-up procedures
3. Building a data bank and utilizing human resources
4. Office procedures
5. Problem identification
6. Problem solving - decision making processes
7. Evaluation type activities
8. Utilizing committees
9. Working with people in groups for change
10. Use of ERIC Thesarsus
11. Coding procedures for using QUERY
12. Input and output procedures of the ERIC system
13. Relationship between retrieval staff and field agents
14. Establishing goals and priorities

15. Philosophic and macro dimensions of pilot dissemination activities
16. Strategies and techniques for diffusion
17. Knowing the client
18. Working in the bureaucracy
19. Assisting in outlining alternatives
20. Working with consultants
21. Intra-staff communications
22. Administration of the coordination function
23. Coordinating field agent activities with clients adoption activities
24. Involvement of people
25. Planning for change

While the training staff felt that considerable progress was accomplished in the second stages of the training program, it also felt that there was considerable work to be done both in the conceptual and executional phases of such matters as the following:

a. Institutionalizing the programs within the states.

b. More effective, continuous communication and interlocking ties to various other components of the state educational agency.

c. Commitment to, identification of, and utilization of expert human resources for the identification and resolution of specialized educational problems.

d. Additional refinement of goals and objectives, priorities, differentiated functions and roles, and expectations related thereto as they pertain to evaluation, reward, and reinforcement.

e. Project monitoring in management systems related to more clearly delineated goals and objectives (the relatively open status of these dimensions was not unexpected at this stage of development; however, as the states move in their other activities more toward management by objectives, performance criteria, et cetera, and as the projects become more clearly crystalized in terms of their activities as well as the relationship of their activities to other units in the state, it will be inevitable that they will be called upon to become more specific in their goals and activities than they have been in the formative stages of their development.

9. The Third Training Program:

As suggested in the May meeting, which was held in Chicago, Illinios, the evaluation team, after studying the progress for the past nine months, compiled a check list of concerns which was sent to the training team. The training team made minor revisions and some additions and forwarded this to each project director (Appendix N) who distributed the sheets to his staff members for identification of training needs. These were returned to the training team who analyzed and compiled the information.

During July and August the training team made site visits to each of the states. This was not the ideal time, as some personnel were on vacation; one was in school, and others were unable to do much work in their areas because the public school people were on vacation. It was almost impossible to visit any of the schools where work had been done.

In planning the third training session, the training team was cognizant of:

a. The expressed concerns of the trainees gained through the check list.

b. The comments and recommendations made by the trainees during the site visits.

c. Comments and recommendations made to the training leaders by the evaluation team member in August, 1971.

d. The direct suggestions and consultations held with the project directors and USOE staff members.

e. The questions and problems submitted by the retrieval staff to the training team.

f. The case studies prepared by the field agents.

g. An expressed desire on the part of the field agents to visit a successful Missouri field agent.

The overall objectives were to:

a. Review the expectations of USOE for the individual projects.

b. Learn the operations in the three states by seeing the forms and studying the case studies.

c. Provide speakers and information to answer the expressed concerns on the check sheet.

Objectives for project directors, retrieval staff, and field agents were to:

a. Know the operation of the ERIC Clearinghouse; the procedure for screening information for ERIC.

b. Know the availability of resources in addition to ERIC.

c. State some of the changes and studies being conducted by USOE pertaining to ERIC.

d. Be aware of the quality of some of the recently published research in education.

e. Select criteria for screening the abstracts and alert the trainees to the dangers of making definite statements on the usefulness of abstracts.

f. Learn procedures for utilizing educational research.

g. Discover additional ways to motivate clients to utilize the print-outs.

h. Learn how to classify the abstracts into researched and nonresearched categories.

Objectives for the project directors were to:

a. Become cognizant of methods of keeping clients informed.

b. Discover new ways to motivate the staff.

c. Explore different types of in-service meetings.

d. Become efficient in recognizing expertise on the staff.

e. Work out a procedure for granting promotions.

f. Keep abreast of the general program.

g. Educate the staff in "selling" its product to school systems.

Objectives for the Retrieval People were to:

a. Assist the trainees in solving the problems they submitted to Glenn White.

b. Develop a check list for the information retrieval dissemination function.

c. Develop a manual of operational procedures.

d. Establish written policies for various functions.

e. Develop approaches to selections of plausible alternate descriptors.

f. Search portions of the ERIC file which existed prior to the addition of a given descriptor in the Thesaurus.

g. Become familiar with the abstracting and indexing procedures used by the ERIC Clearinghouses and relate these to retrieval activities.

h. Learn the fundamentals of symbolic logic for problem statements.

Objectives for the field agents were to:

a. Become familiar with the procedures used by agents in other states.

b. Learn additional ways of helping the clients understand and interpret the information.

c. Discover additional ways to translate research into action alternatives.

d. Assist clients in selecting appropriate solutions.

e. Learn how to assess the impact of clients and evaluate the services given.

Tabulation of the Check Sheets of Concerns:

The check sheets to indicate the areas of "great concern" were sent to each of the trainees. After these were returned, they were tallied and printed as items of utmost concern (Appendix O). The advisory committee and training team used these concerns, findings of the third site visits, and discussions with the evaluation team for the basis of designing the third training program.

The training team contacted the project directors, evaluation team, and the members of USOE for advice on selecting people to make presentations and lead discussions at the third training program. As each person was contacted, he was given definite expressed concerns to discuss with his group.

Retrieval Personnel

The concerns expressed by the retrieval people on the one list

of concerns were put into categories. They were:

a. Identification of exemplary practices

b. Retrieval problems and issues

c. Evaluation of retrieval services

d. Developing information packages for target groups

e. Management

f. Utilization

As the training team planned the training session, it was cognizant of all the expressed concerns under the above topics and speakers and discussion leaders were given definite responsibilities to cover these (Appendix P).

The training team asked the retrieval people to submit some of their actual problems to Glenn White. Numerous problems were submitted and Glenn White designed his entire work session around these problems. Since these problems were submitted several months before the training session, there were changes and updates by telephone contacts with some of the retrieval people.

The general objectives for the session were to review:

a. The retrieval problems submitted by various states.

b. Abstracting and indexing procedures used by the ERIC Clearinghouses and relate these to retrieval activities.

c. Procedures for determining the extent of agreement on the relevancy of a set of abstract.

d. Approaches to selecting plausible alternate descriptors to search portion of the ERIC file which existed prior to the addition of a given descriptor to the Thesaurus.

e. Fundamentals of symbolic logic for problem statement.

Office Procedure and Forms of Retrieval Office

During the three site visits there was expressed desire on the part of the retrieval personnel to review the procedures of the other two state retrieval offices and discover how they had adapted the material presented to them during the First Training Session. An afternoon was set aside and each state retrieval group showed and discussed procedure and forms.

Later in the training program, a member of the training team worked with the retrieval personnel and project people to initiate the writing of a manual for office procedure.

The objectives were :

a. Develop a check list for the Information Retrieval and Dissemination function.

b. Develop a manual of operating procedures.

c. Establish written policies for the various functions.

d. Request each state return a copy of the results to Univeristy of Missouri-Columbia and send copies to the other two states for examination.

Case Studies For The Field Agents:

Again when making the site visits, the field agents expressed how much they had learned when discussing a definite case study. For one session of the third training program, each field agent was asked to review one of his case studies. This was to bring about interaction among the field agents and learn new ways to improve their effectiveness. Their guidelines were:

a. For each field agent to review one of his projects (cases) with the group.

b. For each field agent to use a grid to analyze the project (case) reviews.

c. Through the use of the grid, the group would discuss the projects (cases) in terms of how to improve field agent procedures and effectiveness.

In addition the field agent was prepared to discuss:

a. The various roles he played in this case study.

b. The follow-up he did at the time and any future follow-up planned.

c. If he would do the case again, how he would handle the case.

d. Any "Tricks Of The Trade" of being a field agent he would like to relate.

Making Plans To Visit A Successful Field Agent In Missouri:

During the third site visit the trainees mentioned that it would be extremely valuable to visit a successful field agent in Missouri. Since Missouri does not have the educational field agents, the training team identified several industrial field agents in the Kanses City area. This field experience was made optional and was scheduled after the three day training session. Letters were sent to the seven field agents and of this group two expressed a sincere interest in spending the additional day.

The training team made detailed plans for this experience. One of the field agents decided to participate, and he declared it most profitable.

The planned program for the Third Training Program (Appendix Q) was mailed to the project directors, retrieval personnel and field agents to review and make recommendations. A week before the training program, the associate director called the project directors to get additional comments.

Evaluation of the Training Program By The Evaluation Team:

A "relevance/involvement/effectiveness" rating scale was constructed by the evaluation team to measure effectiveness of the Third Training Session. This was presented to the trainees the first morning of the training session. The findings are given in Appendix R.

In addition, each trainee was asked the following question: "You have been in the business now for around a year and we have quizzed you a number of times on your training needs. We feel you might now be able to tell us some of your suggestions for: How you would like to be trained? How would you have strengthened or improved the third training session?" (See Appendix S.) In general the reaction was as follows:

a. The training session was informative and the group considered this third training session the best of the three.

b. The material covered was relevant and useful and involved group participation.

c. The training with White, Persell, and Hoff was valuable. Many would have continued this type of training.

d. The field agents desired more time to meet together to discuss problems and work with people in the field.

e. The field observers from the evaluation team should be included in the training sessions.

f. The trainees should have the opportunity to hear specialists in the academic areas to gain adequate insight into what is happening in the field of education.

g. The group was pleased with the amount of growth which had taken place.

To summarize the entire training program, the research associate outlined the subjects dealt with during the training project. To make this valuable the objectives stated in the proposal submitted by the University of Missouri-Columbia are coded by items in the outline. (Appendix T.)

During the year and one-half that the University of Missouri-Columbia was involved in the Pilot Training Program, the training team kept a log of the activities involving the projects. This included the amount of time spent on each phase and the persons involved (Appendix U).

## IV. INTRODUCTION TO WORKING BELIEFS AND OBSERVATION OF TRAINERS

This section of the report is intended to expand upon the actual activities and more specific characteristics of the training program described in other sections of this report by dealing with certain observations and beliefs of the trainers which relate to the projects, project personnel, situational variables and operational activities. The material in this section can only be viewed as insights, beliefs, biases and/or observations of the trainers based upon a combination of their own backgrounds interacting with their experiences in the training program.

The material in this section is, to some extent speculative but not fictional. It represents the outer fringes of this project but, in the long run and to the extent that these observations and insights are verified or refuted in subsequent, similar efforts, this section may well offer more merit than the more "objectivity" documented material. Its primary value may lie in a set of observations from a particular "vantage point". For example, the concept of a mountain range may be quite different from a person flying over it than from a person trying to navigate it on foot.

Nothing herein is intended nor should be interpreted as attributing motives to any project or person. Rather it represents an attempt to state the views of the trainers representing their conception of things as they were--not why they were. These were phenomena which the trainers believed to be present and which had to be taken into account in the developemnt and implementation of the training program.

As has been stated in other areas of this report, but needs to be emphasized here, the training staff has great respect for the dedication and integrity of those involved in this project.

The method used to gather information for this section was the interview method. A conceptual model for the interviews was adapted from Havelock"s Planning For Innovation Through Dissemination and Utilization Of Knowledge. This model consisted of topics developed by Havelock and selected because they offered a relevant way to organize each trainer's observations.

A research assistant interviewed each major member of the training team and recorded the observation-interview schedule. The material was then synthesized and presented to the "team" for review, clarification and correction. The material which follows is the result of that process.

## A. Role Of The Trainer

The training staff members' concepts of their roles varied. Their views of their roles ranged from a directive role, through a counseling role to a linking role. There is some evidence that these roles changed according to the timing and purpose of the training project. The trainers considered themselves linkers primarily in the sense that they were able to link their experience to the trainees. The trainers were, in general, able to utilize their extensive experience to provide information where research literature was lacking. Several trainers were able to use research in specialized areas such as data processing. The training staff did give examples when they could be directive due to the force of their knowledge authority.

A great deal of time can be spent by professionals building up barriers to service. On the other hand, often the professional client relationship can serve to guarantee a quality of service. (Havelock, 1969, 3-22.) The trainer-trainee interface of the pilot program did not seem to contain factors similar to the professional client relationship even though the trainers were professional people. Service was not limited significantly; control over the trainee was desired by some of the training staff, but trainers had only very limited control. Feedback did not seem to be significantly impaired. There is some indication that project staff members were limited in their choice of service, but this also seems insignificant. The training project used quality people who had professional standards. In every case they seemed committed to providing the best possible service.

Several personnel worked with restricted time allowances but others were flexible enough to meet any demands of the program. The limits were on the opportunity to train rather than the capacity to train. The value of the training was somewhat limited by the lack of a pre-service training base, lack of initial specific program goals and objectives and on occasion some reluctance on the part of the project directors to always view their project operations critically and openly with the training team. There were the expected limitations caused by waste due to hesitancy, bureaucracy, and other inadequacies.

Limited control over the trainee, not particularly relevant to training reinforcemtnt, was provided by control over expense accounts

during the training program. Project staff members had some obligation to participate because of the program terms. The strongest control available to the training team was the control resulting from the trainers' knowledge and experience. There was some question among the trainers as to whether control other than this authority of knowledge was necessary. More control would have been necessary to insure immediate success, direct behaviors, and reinforce trainers. Control was felt to be unnecessary to meet the objectives of the local projects or to develop trainee independence. The trainers felt that in this kind of training situation, it was more advantageous to make suggestions which were usually carried out than to make demands.

The trainers spent a great deal of time developing feedback. Social interactions and visitations were encouraged. Relations with the trainees were established on a first name basis. About one third of the time spent with the trainees was involved in social situations where rapport developed. The purpose of these attempts was to eliminate the status and power differential in favor of increased communication (Havelock, 1969, 3-23).

The trainee was prevented a choice of service primarily as a result of the necessity for the trainers to present a single program with finite resources. The project staffs were given every opportunity to shape the training program through their suggestions and recommendations. Trainee input into the first training program was limited by the inability of the dissemination projects to hire all their personnel by the time of that program. The major project staff request left unsatisfied was the one for demonstrations by experienced personnel. The trainers had the knowledge and capacities to do demonstrations for the trainees, but they did not consider it part of their role nor wise when visiting the states such a short time. Interproject visitations were generally not feasible for financial reasons.

No objective standard was applied to the service provided by the trainers. The major criteria applied by the trainers was that of relevance. The trainers strove for the best fit of service to needs. Training project administrators, with recommendations from the project directors, evaluators and USOE, attempted to maintain a high quality of service by selecting the best qualified trainers and resource personnel.

## B. Data Collection

### 1. Barriers:

As the training team examined the barriers they realized they were outnumbered by the positive results. The barriers to data collection by the trainers included the expected problems of time and finances. However, the state project directors were most helpful and prompt in supplying the requested data for the training team. The project participants were willing to answer the questions submitted by the trainers. However, on several occasions there was some hesitancy to

always take the trainers into their complete confidence. This could be tied to the fear that the trainers worked in a evaluative role.

It appeared that the state department consultants did not always place the project on their "high priority"list. The trainers realized the state department consultants had full time responsibilities to their own activities independent of the dissemination projects. It would have enhanced the operation of the State Dissemination Projects if they could have been involved in more of the activities. This problem could have been effectively solved if the position of the project director in the department would have been at a level which would have given them administrative authority over the units in which the state consultants worked.

One additional barrier involved the failure of the evaluation project to return data that was considered satisfactory to the trainers for maximum usefulness. In this regard there was a built-in ambiguity between training and evaluation due to the nature of the evaluation design which required the evaluators to be, in part, trainers as well as evaluators.

2. Data:

Types of data which were collected by the training team apart from task needs included personal values and needs, vested interests, interpersonal relationships, and communication links.

a. Personal Values

The values observed by the trainers include service values and a generalized newness value. With regard to social service value, many of the program staff members felt very concerned about helping children. They felt that education was vital to the development of children. Many expressed the conviction that education must be improved. Many could see immediate changes in educational programs. A few had difficulty adjusting themselves to the fact that they were only part of an organization that was not likely to have an immediate and dramatic effect on education.

b. Vested Interests

Several vested interests having an affect on the training program were reported:

1. Higher education institutions and SEA's sometimes view one another as competitors in the field of knowledge dissemination and utilization. However, in a few instances project staff did utilize the expertise of faculty from institutions of higher education.

2. There was indication that the pilot dissemination project should be viewed not as an end in itself, but rather as a part of a total dissemination program of which ERIC was another part. This seemed to result in an emphasis on a quantity distribution of ERIC material instead of a quality distribution.

3. What may be the most dynamic of the vested interests involved the feeling by the trainers that the states were using the dissemination program as a vehicle for their own change. Though these vested interests were considered by the trainers they did not present any major obstacle to the training project.

c. Interpersonal Relationships

Personal needs identified by the trainers included a need for social acceptance, recognition and achievement, personal meaning and importance, job satisfaction, and security. The need for social acceptance included a need for reinforcement from a simplistic system of values. This could have impaired the communication of direction, reinforcement and support.

d. Communication Links

The trainees were involved in a fairly complex net of communication links while on their job. The links of concern to the trainer were the ones capable of transferring the trainee information about his job. The strongest of these links was the link between the field agent and his clientele and the link between the field agent and the retrieval staff. Many staff members developed strong links with the field observers of the evaluation project. These observers were well-educated university personnel, who, from their objective viewpoint, were capable of presenting useful advice. Other similar links were maintained with USOE personnel. The links developed at workshops and conferences seemed strong in some instances and weak in others. Staff in similar positions in the project did generally communicate with one another, but there were several instances of this communication being inadequate. Though there were several cases of field agents and retrieval staff traveling to visit similar personnel in other states, more of this would have been desirable. Links with ERIC centers and other educational research centers were maintained. In some cases during the early stages, links were weak between the directors and their subordinates.

However, this problem was dealt with in the second training program.

The trainees can be identified as having been a part of a number of systems and organizations some of which were probable more important to the trainee than their job with the dissemination project. On the immediate level, the local target school districts had the large measure of control of the employment of the remainder of the project staff and directly or indirectly provided the salaries for all the staff. Should the project fail the trainees would have to be concerned about their relations to local schools to enable their future employment. On a more remote level the trainees were responsible to USOE as the project funding organization. Their relation to the evaluation project would to some extent determine whether they would be with the project, should it be refunded.

## C. Research

In order for the project to begin on schedule, it was necessary that trainers be selected who could provide useful information from their own education and experience. The trainers definitely brought a large amount of quality experience to the project which, by and large, substituted for the lack of formal research literature in the field. This experience involved an extensive amount of informal research done while the trainers were employed in programs with objectives and structure similar to the pilot state dissemination program.

Most of the research effort of the training team was spent in reviewing the literature to search for materials having applicability to conceptual and application dimensions of the information process, its sub components and special topical areas which arose during the duration of the training project.

In spite of the limitations the training staff members were able to develop some research data. Most of the research effort was spent developing training materials and locating resources. A bibliography of research on change was developed. Several training problems and needs were researched in depth. Subjects researched include: the use of committees; other programs of training for change; an adaptation of extension methods of change to the dissemination projects situations; goals of USOE; and adaptation of retrieval center programs to the pilot project.

## D. Interpretative Schema For Planning

Trainers used a variety of conceptual schema to analyze and interpret the raw data which they collected. As a general approach they compared their observations of the dissemination projects to expectations they had developed through their experience with the University of Missouri Extension Program. Another general approach

involved the comparison of the self-concept of the project staff to the actual situation. This process included finding out what the trainees are doing; having the trainees verbalize what they are doing; pointing out to the trainees any inconsistencies between fact and their verbalization; and allowing the trainees to develop new conceptions of what they are doing that are more consistent with the observed fact. The training team also attempted to view the whole program as a unit with each dimension a subpart of the unit. They then attempted to relate each part in a way such that the whole operated as a unit, yet each part retained its integrity and sphere of influence. On a practical level comparisons of alternatives were made in terms of the most probable benefit compared to the anticipated cost. A great deal of common sense and sensitivity came into play including practical knowledge about how people behave and why.

## E. Communication, Collaboration and Implementation

Two way communication between the trainers and trainees was a goal. Interpersonal contact between trainer and trainee was emphasized during site visits and training sessions. Directed sessions including lecture-type situations were always open to discussion and questions. (Such communication has been found to be helpful when complex information is required to bring about attitudinal, behavioral or moral changes [Havelock, 1969, 9-25].) In addition to communication during the training sessions, a fair amount of communication occurred outside the training session. Informal communication which was recorded as taking place between the training project, through its administrative office, and the various other projects.

Any interruption of this communication process was a prime concern of the trainers. Various barriers to communication had been identified by the trainers.

The trainers do not hesitate to state there was tremendous growth during this training period. It was apparent the members were well chosen for their assigned positions. Some reached a level of sophistication, and all were enthusiastic and eager for information and ways to improve to expedite their work. However, even with these attributes, this report must include some barriers to help future projects in their planning.

1. Barriers:

   a. <u>Self-Actualization</u>

      1. It is important for each project member to develop a job description of his role. If this is not developed, there is a tendency for them to be naively idealistic and unwilling to face the hard realities of their role.

2. The need for recognition and achievement expressed itself as a willingness of the trainees to sacrifice quality for quantity. Though the success of the project was important to the trainees, they sometimes placed emphasis on quick turnaround time and an immediate response.

3. The physical isolation of the field agent from the project office made it difficult for him to receive the recognition and support that he needed for his task of developing rapport. This problem was alleviated by providing the field agent with data to help him anticipate and overcome personality conflicts, adverse publicity and other aspects of his interpersonal role.

4. The trainees expressed their need for meaning and importance by their feeling that what they were doing must make a difference. They wanted to be of service to children. Some trainees wanted to be credited with the sole responsibility for a change rather than wanting to be only a part of a larger picture. The need for security was indicated by their concern for project survival and a certain deference to the evaluation project and the funding organization (USOE).

b. Interpersonal

The primary interpersonal relationship of concern was the relation between the leader and his follower. The behaviors of the leaders involved with the project, as a whole, presented some problems to the training staff. Even the leadership provided by USOE and SEA personnel lacked direction and adequate support for the staff of the project. The interest of these official visitors in the training program tended, at times, to overshadow the interest of the project staff. Variations in the advice given out by these visitors tended to increase the effort required by the trainers to serve the trainees. There seemed to be a good deal of ambivalence on the part of the project director to move vigorously in all areas of the project. These various problems will not be explained but various clarifying suggestions can be made for their existence.

1. The fact that the dissemination organizations were new suggests that project directors were forced to take time to think through for

themselves ramifications of alternatives.

2. The pilot nature of the program with its built-in flexibility and lack of specificity with regard to goals, roles, and procedures resulted in a great deal of uncertainty.

3. The administrative and operational structures for field agents also contributed to uncertainty as to expectations, role, and accountability between state and local or intermediate units.

4. The physical decentralization of the project no doubt added to the communication problems between the directors and their staff.

c. Psychological Factors Relating To Trainers

The concepts of trainer status and credibility were the psychological factors relating to the trainers that developed the training project. The organizational status of the trainers was reduced by the project's emphasis on close interpersonal communication; however, the status developed by the trainers because of their knowledge and experience was sufficient to assure the trainee's attention. Some trainers did have higher positions than the trainees in organizations outside the training projects, but this was not always the case, Trainees seemed to feel that SEA personnel had high status. The trainers felt the trainees would have had greater influence if their status had been higher in the SEA.

The concept of credibility was the other psychological factor relating to the trainers. The training staff were generally able to develop credibility through their grasp of relevance of their background. For example, information on how to run a school would be questioned if the trainer did not have administrative experience. Some project staff did tend to question the applicability of university extension concepts because of an apparent negative association with the field of agriculture. It appeared that those trainers associated with the university rather than an SEA were sometimes suspect perhaps because of divergent philosophical orientation between the two organizations.

d. Psychological Factors Relating To Trainees

Psychological factors relating to the trainees will be expressed as attitudes observed by the trainers. There were several instances of trainees' unwillingness to recognize their problems. This was not nearly so common in the technical areas as it was in areas where human relations were important. At first, the

project directors in particular were not always willing to recognize their full responsibility to their subordinates in the project. Toward the end of the training program, the members of one project felt they had grown and developed to the stage of independence. This was the goal for all projects. Some project directors seemed to have the attitude that everything was fine and were hesitant to discuss specific problems that might have existed in their projects. The dissemination projects generally did not seem to feel that the expert interpretation of research by subject in the light of local situations was necessary. This attitude tended to block full utilization of dissemination and utilization models. The trainees appeared to have an inadequate notion of the complexity of relevant knowledge areas; as a result they expected that the relatively short first training session would adequately prepare them for their job. There was also some resentment on the part of trainees to the demands made during the initial training session, including full day and evening sessions. The evaluation project distributed a questionnaire which appeared to irritate some of the trainees during the first training session.

e. Factors Relating To Training Sequence

Selective exposure, and follow through are concepts relating to the training sequencing of the training project. Selective exposure involves the idea that trainees more readily assimilate information if it is closely related to their own needs. The training team generally took this into account as a result of their emphasis on meeting the trainees' needs. The main problem occurred during the first training program because trainers were not able to assess the needs of the trainees who had not been hired prior to the training session. The training staff felt that they should have insured that the attitudes and perceptions of the project staff trainees were ready by allowing more time for them to discuss their various projects and the skills, knowledge and abilities required to perform efficiently. There was indication that the project directors felt that the group training programs, which were usually aimed at the majority of the project staff, tended not to be keyed to the directors' needs.

Follow through by the trainers was not a problem because the trainers were careful not to promise what they could not deliver. Follow through was hindered, however, by the long time gaps between training sessions. Feedback time was lengthened by the large geographical distances involved. Follow through became somewhat irregular when some action by project staff was required.

f. Institutional Factors

The primary institutional barrier resulted from the problem

of marginality. The various projects were somewhat marginal with the respect to one another and to supporting organizations such as USOE and SEA's. Areas of responsibility were never adequately delineated. Project personnel found that they were sometimes in conflict with non-project personnel because of a role overlap. Sometimes field agents had difficulty reconciling strong responsibility to the local school districts and the SEA. The dissemination projects position in the SEA did not guarantee accessibility to state specialists. Finally, there was some lack of commitment of the trainees to the trainers as a result of the diffusion of control over the program as a whole.

Another barrier resulted from the difficult relation between the evaluation project and the trainers. The evaluation project did not always supply project evaluation information that was seen as adequate by the training team. They did supply the dissemination projects with suggestions and feedback throughout the program. The maintenance of objectivity of the evaluation project through its isolation was, no doubt, a worthwhile endeavor; however, additional means of assuring the full cooperation between the evaluation project and the training project must be provided.

g. Language Factors

Several language barriers were developed from trainers' observations. The most serious arose from the general negative association with agriculture. Illustrative statements couched in agricultural or even extension terminology were very poorly received. Trainers had to translate such statements into terms more acceptable to the trainees before they would be assimilated. Some of the trainees were very sensitive about terms relating to roles and tasks. These terms seemed to carry with them implications and connotations beyond the meaning of the words. The best example of this is the fact that the field agent described by the USOE is referred to as a communication specialist and a resource agent in the state projects. Such differences in terminology indicate differences in underlying structure which make generalizations about the projects difficult.

## F. Accountability

There were essentially three components, the operating projects, the evaluation team and the training team, all of which had contractual accountability to USOE with some built in accountability to each other in a general way. Beyond this, however, accountability in the normal sense of its use was very diffused and often vague. This, of course,was not unexpected and was, in fact, an integral characteristic of the project. However, this phenomenon did present some problems of a different kind than those which exist in a linear project where responsibility for operation, training and evaluation exists in a single

organizational and administrative structure.

There were few coercive powers vested between the three components and little financial accountability between projects thus necessitating a fairly substantial degree of project monitoring at the operational levels by USOE.

There were observable concerns among some project staffs with respect to accountability. These concerns manifested themselves in the following general areas:

1. Attempts to get clear in their minds the nature and dimensions of the "game." This seemed to be more pronounced, predictably, among field agents than retrieval staff.

2. Some confusion on the part of all concerning accountability to local or intermediate units, SEA and beyond.

3. A relatively strong apprehension concerning the activities, purposes and possible conclusions of the evaluation component in spite of several attempts of the evaluation team to clarify their concerns. Staff in the projects seemed to be looking frequently for "hidden agenda" in the evaluation process which might affect their "rating."

### G. Management and Organization

Trainers were generally satisfied with the management of the training program. All indicated that more training time was desirable but none indicated that they were overloaded by the schedule uses. Both training project administrators indicated that they had spent additional effort that was not reflected in their budgeted commitment. The administrators did encounter scheduling problems that interfered with the performance of the program. For example the best time to schedule the third site visit was during the summer. During the summer, however, many aspects of the program were not active. Schools were closed and some of the project staff were on leave, on vacation, or in school. The training staff members were generally pleased with the training project administrators' ability to keep the program flexible to meet the needs of the trainees.

## V. CONCLUSIONS AND RECOMMENDATIONS

The training project proceeded generally along lines established in the proposal. The progress of the project, within the limitations of the proposals and local conditions, were satisfactory to the trainers. Changes which did occur during the course of the project;

for example, the decision to have the second training session held in each state for that state project's staff, were consistent with the overall project objectives of meeting individual needs. The major accomplishment of the project was the facilitation of any success that the various state dissemination projects will ultimately enjoy. The training staff did feel satisfied that it was, in part, through their individual efforts that the state dissemination projects were able to set up and make operational the beginnings of D-U operation in each of the three states.

Several recommendations can be made that would improve future efforts in the same direction as this training project.

1. A more adequate research base needs to be developed. The training team was not unduly handicapped by this lack as a result of their extensive experience with extension programs; but persons engaging in training activities of this nature without some experience with an extension type system may find considerably more difficulty with the many facets, often subtle, of this kind of program.

2. Future dissemination organizations need to have a more definite organizational structure, a higher position in the total organizational hierarchy, and a clearer relationship to the total organization. Flexibility needs to be maintained but there seems to be no reason why roles and priorities cannot be established.

3. The nature of the project needs to be brought more in line with the specialization of modern bodies of knowledge. Ways to assure that content specialists in education are utilized in the interpretation and application of research information must be developed with care. The generalist and the process person has a vital role, but specific problems require specific expertise.

4. Assumptions should not be made about the trainees' readiness for training. Care must be taken by a training team that the trainees spend a great deal of time discussing their tasks and the nature of the training program prior to the beginning of training. The trainers should take this opportunity to assess trainees' expectations and attitudes. The training program should then be adjusted accordingly.

5. Extensive research needs to be done into the relation between training and evaluation. Careful thought and investigation must be given to the possibility of conflict of interest in a formative

evaluation process, and particularly the nature of the relationship of this kind of evaluation, both positive and negative, to the operation of a training program. It is very likely that the formative evaluation process mitigates against a separate training component and that training, in a project utilizing formative evaluation, should be conducted under the aegis of the same agency responsible for evaluation.

6. Educational change through information dissemination is a very complicated process requiring, for maximum success, a great deal of inherent ability, knowledge, skill and insight - far too much to be dealt with effectively with on-the-job training. A program of pre-service education of at least one year in duration, outside the pressure of the job and organizational configurations, should be developed to supply a cadre of minimally qualified entry level people for this kind of position.

7. There is great concern with "packaging" and "transportability." There is no doubt that information can be packaged and tranported. This has been done with books for many years. However, great caution needs to be exercised in the packaging and transporting of training programs. It is the point of juncture between information and personal and situational variables which is the critical aspect of a training or educational program and this can be supplemented but never replaced by a packaged program without great sacrifice in quality. There is no adequate substitute for expert human resources to deal with problems and issues which are dynamic in character. In fact, the whole notion of the use of interpersonal link in the dissemination and utilization process is built on this concept. Education for dissemination and utilization or anything else can do no less and maintain the quality it should have.

8. Actual visitation, site visits, as frequently as possible is vital to a training program of this nature. A great deal of "guts" insight and training can take place in this context as well as the development of items for needed attention in more formal training activities.

9. Appropriate dosages of project intervisitation on functional basis needs to be built into training activities. These can be useful in dealing with morale, transfer and expansion,

idealism and creativity. However, these should be structured and "supervised" by a training component to achieve maximum benefit.

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# APPENDIX A

## Personnel and Attendance

Appendix A
Personnel and Attendance
UNIVERSITY OF MISSOURI-COLUMBIA
COLLEGE OF EDUCATION AND UNIVERSITY EXTENSION COOPERATING

Advisory Committee and Training Team

| Name | Responsibility | Attended |
|---|---|---|
| A. Sterl Artley<br>Prof. of Ed.<br>UMC | Advisory Committee | 1st Training Program |
| Edward C. Carroll<br>Director-Library<br>UMC | Advisory Committee | 1st Training Program |
| Donald Fancher<br>Asst. Dean<br>Extension Div.<br>UMC | Advisory Committee | 1st Training program and part of 3rd Training Program |
| Carl C. Fehrle<br>Assoc. Prof.<br>of Education<br>College of Ed.<br>UMC | Associate Dir. of Pilot Training Program | Organizational Meeting-Aug. 12 & 13, 1970 Columbia, Mo.<br>All 3 Training Programs |
| Larry A. Hale<br>Consultant for<br>University Wide<br>Extension<br>University of Mo. | Advisory Committee<br>Instructional Staff | All 3 Training Programs |
| Randel K. Price,<br>Director<br>Training and Staff<br>Development<br>University Wide<br>Extension<br>University of Mo. | Advisory Committee<br>Instructional Staff | All 3 Training Programs |
| William W. Hoff,<br>Coordinator<br>Technical Reference<br>Center<br>UMC | Advisory Committee<br>Instructional Staff | All 3 Training Programs |

| Name | Responsibility | Attended |
|---|---|---|
| Charles H. Koelling<br>Director, Cont.<br>Professional Ed.<br>Prof. of Ed.<br>UMC | Dir. of Pilot<br>Training Program<br>Instructional Staff | Organizational<br>Meeting-Aug. 12 &<br>13, 1970<br>Columbia, Mo.<br>All 3 Training<br>Programs |
| Paul T. King<br>Director, Testing<br>and Counseling<br>Services<br>UMC | Instructional Staff | 2nd Training<br>Program for<br>South Carolina |
| Glenn White<br>State Department<br>of Education<br>Jefferson Bldg.<br>Jefferson City,<br>Mo. 65101 | Director of<br>Research<br>Instructional Staff | All 3 Training<br>Programs |

OREGON BOARD OF EDUCATION
942 Lancaster Drive, N.E.
Salem, Oregon

| Name | Title | Attended |
|---|---|---|
| George Katagiri | Project Director | Organizational<br>Meeting-Aug. 12 &<br>13, 1970<br>Columbia, Mo.<br>All 3 Training<br>Programs |
| Jack K. Bech | Retrieval | All 3 Training<br>Programs |
| Michael Call | Retrieval | 3rd Training<br>Program |
| Sondra Isom | Retrieval | 2nd Training<br>Program |
| Rosellen Moser | Retrieval | All 3 Training<br>Programs |
| Stephen N. Stivers | Area Specialist | All 3 Training<br>Programs |

| Name | Title | Attended |
|---|---|---|
| Robert A. Fussell | Area Specialist | 2nd and 3rd Training Programs |

RESEARCH INFORMATION SECTION
STATE DEPARTMENT OF EDUCATION
1208 Rutledge Building
Columbia, South Carolina 29201

| Name | Title | Attended |
|---|---|---|
| W. E. Ellis | Project Director | 1st Training Program, Part of 2nd Training Program |
| Diana J. Ashworth | Chief Supervisor | All 3 Training Programs |
| Tamara D. Crolley | Communication Specialist | All 3 Training Programs |
| Alfonso J. Evans | Communication Specialist | All 3 Training Programs |
| Eilene Folger | Information Analyst | All 3 Training Programs, Organizational Meeting- Aug. 12 & 13, 1970 Columbia, Mo. |
| Ellen Tollison | Information Processor | 2nd and 3rd Training Programs |
| Jane H. Ness | Information Technician | 2nd Training Program |
| Jeanie Dolan | Information Technician | 2nd Training Program |
| Sharon L. Gibson | Chief Secretary | 2nd Training Program |
| Sonja Evans | Clerk Steno | 2nd Training Program |
| Sam Greer | State Consultant | 2nd Training Program (part) |

UTAH BOARD OF EDUCATION
136 East South Temple
Salt Lake City, Utah 84111

| Name | Title | Attended |
|---|---|---|
| Kenneth P. Lindsay | Project Director | Organizational Meeting-Aug. 12 & 13, 1970 Columbia, Mo. All 3 Training Programs |
| Kathleen Wallentine | Retrieval | All 3 Training Programs |
| David G. Church | Field Agent | 3rd Training Program |
| Jerald S. Hawley | Field Agent | All 3 Training Programs |
| Norman Kohler | Field Agent | All 3 Training Programs |
| Voyle L. Munson | Field Agent | 1st Training Program (part) |
| Ruth Neilsen | Field Agent | 2nd Training Program |
| Shirley Ayres | Secretary to Field Agent | 2nd Training Program |
| Maxine Lorenson | Secretary to Field Agent | 2nd Training Program |
| Eleine Osborne | Secretary to Field Agent | 2nd Training Program |

UTAH STATE DEPARTMENT PEOPLE

| | | |
|---|---|---|
| Elsie Dee Adams | Media Specialist | 2nd Training Program |
| Allen Abuer | Specialist, Social Studies | 2nd Training Program |

| Name | Title | Attended |
|---|---|---|
| Jewel Bindrup | Specialist, Language Arts | 2nd Training Program |
| Don Clark | Specialist, Math | 2nd Training Program |
| Mary Cooley | Utilization Officer, Utah Tech. College | 2nd Training Program |
| Bill Cowan | Research Asst. and Acting Coordinator of Title III, ESEA | 2nd Training Porgram |
| Jay Donaldson | Specialist, Ed. Testing and Measurement | 2nd Training Program |
| Brent Gubler | Coordinator, Adult Education | 2nd Training Program |
| Vola Hancock | Specialist, Reading | 2nd Training Program |
| Elliot Howe | Specialist, Foreign Langrage | 2nd Training Program |
| Craig Kennington | Coordinator, Title I, ESEA | 2nd Training Program |
| Robert Lunnen | Procurement Supervisor Manpower Development & Training Act | 2nd Training Program |
| Florence Magleby | Specialist, Remedial Programs | 2nd Training Program |
| Lerue Winget | Deputy Superintendent Office of Instruction Services | 2nd Training Program |

U.S. OFFICE OF EDUCATION

| Name | Attended |
|---|---|
| John M. Coulson<br>Research Associate<br>Division of Practice Improvement<br>National Center for Educational Improvement<br>Washington, D.C. 20202 | Organizational Meeting, Aug. 12 & 13, 1970, Columbia, Mo.<br>1st and 3rd TRaining Programs |
| Thomas D. Clemons<br>Director<br>Division of Practice Improvement<br>National Center for Educational Improvement<br>Washington, D.C. 20202 | Organizational Meeting, Aug. 12 & 13, 1970, Columbia, Mo. |
| Richard Elmdorf<br>Division of Practice Improvement<br>National Center for Educational Improvement<br>Washington, D.C. 20202 | 3rd Training Program |
| John Newfield<br>Office of Education Fellow<br>Division of Practice Improvement<br>National Center for Educational Improvement<br>Washington, D.C. 20202 | 3rd Training Program |

COLUMBIA UNIVERSITY in the City of New York
Bureau of Applied Social Research
605 W. 115th Street
New York, New York 10025

| Name | Responsibility | Attended |
|---|---|---|
| Sam D. Sieber | Evaluation Team | 1st and 3rd Training Programs, Organizational Meeting-Aug. 12 & 13, 1970, Columbia,Mo. |
| Karen S. Louis | Evaluation | 1st Training Program, Organizational Meeting-Aug. 12 & 13, 1970 Columbia, Mo. |

| Name | Responsibility | Attended |
|---|---|---|
| Loya Metzger | Evaluation Team | 3rd Training Program |
| Matthew B. Miles | | Organizational Meeting-Aug. 12 & 13, 1970, Columbia, Mo. |
| **OREGON** | | |
| Ruth Leeds Love | Observer for Columbia Univ. | 2nd Training Program |
| **SOUTH CAROLINA** | | |
| Mark H. Weiss | Observer for Columbia Univ. | Part of 2nd Training Program Evaluator for Columbia Univ. 3rd Training Program |
| **UTAH** | | |
| Ivan Muse | Observer for Columbia Univ. | 2nd Training Program |
| Raymond Whitaker | Observer for Columbia Univ. | 2nd Training Program |
| Wesley Larson | Observer for Columbia Univ. | 2nd Training Program |

RESOURCE PEOPLE

| Name | Responsibility | Attended |
|---|---|---|
| Milt Baum<br>Dir. of Personnel and<br>Community Relations<br>State Dept. of Ed.<br>Salem, Oregon 97310 | Resource | Organizational Meeting, Aug. 12 & 13, 1970<br>Columbia, Mo. |

| Name | Responsibility | Attended |
|---|---|---|
| Edward W. Beaubier<br>Assoc. For Calif.<br>Administrators<br>Suite 315<br>Naples Center Bldg.<br>5855 Naples Plaza<br>Long Beach, Calif. | Resource | 3rd Training Program |
| Schell H. Bodenhamer<br>Assoc. Dean<br>College of Agriculture<br>(Ext.)<br>Univ. of Mo. Columbia | Resource | 1st Training Program |
| Margaret Brewer<br>Asst. Librarian<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |
| Ralph C. Dobbs<br>Assoc. Prof. of Ed.<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |
| Daniel W. Doell<br>Asst. Librarian<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |
| Steve Douglas<br>Program Coordinator<br>Conferences and<br>Institutes<br>Univ. of Mo.-Rolla | Resource | 1st Training Program |
| E. Leo Grebe<br>3413 Elm Street<br>St. Charles, Mo. 63301 | Resource | 1st Training Program |
| Delmar E. Hatesohl<br>Assoc. Ag. Editor<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |
| Frank Heagerty<br>Prof. of Education<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |
| William D. Hedges<br>Prof. of Education<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |

| Name | Responsibility | Attended |
|---|---|---|
| Richard Herlig<br>Center School District<br>Kansas City, Mo. | Resource | 3rd Training Program |
| Daryl J. Hobbs<br>Assoc. Prof. of Sociology<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |
| Charles W. Hoover<br>National Cnt. for Ed. Communication<br>Dept. of Health, Ed. and Welfare<br>Office of Education<br>Washington, D.C. 20202 | Resource | 3rd Training Program |
| Dale Jackson<br>Area Industrial Specialist<br>Univ. Extension Cnt.<br>103 E. Kansas<br>Liberty, Missouri 64068 | Resource | 3rd Training Program |
| Ralph King<br>Supt. Hallsville<br>Public Schools<br>Hallsville, Missouri | Resource | 1st Training Program |
| Dixie A. Kohn<br>Director of Lab School<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |
| Richard L. Lee<br>Ag. Editor<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |
| Frederick E. List<br>Assoc. Prof. of Reg. and Comm. Affairs<br>Univ. of Mo.-Columbia | Resource | 1st Training Program |
| Herbert F. Lionberger<br>Prof. of Rural Sociology<br>Univ. of Mo.-Columbia | Resource | 3rd Training Program |
| Frank W. Mattas<br>San Mateo County Board of Education<br>590 Hamilton<br>Redwood City, Calif. 94063 | Resource | 3rd Training Program |

| Name | Responsibility | Attended |
|---|---|---|
| William F. McMahill<br>Area Business and<br>Industry Specialist<br>Univ. Extension Ctr.<br>547 First Capitol Dr.<br>P.O. Box 129<br>St. Charles, Mo. 63301 | Resource | 1st Training<br>Program |
| John F. McGowan<br>Dean, Ext. Division<br>and Prof. of Ed.<br>Univ. of Mo.-Columbia | Resource | 1st Training<br>Program |
| William H. Owsley<br>905 Bourne Avenue<br>Columbia, Mo. 65201 | Resource | 1st Training<br>Program |
| Caroline H. Persell<br>Columbia Univ.<br>605 W. 115th St.<br>New York, New York 10025 | Resource | 3rd Training<br>Program |
| C. Brice Ratchford<br>President of Univ.<br>of Missouri<br>Univ. of Mo.-Columbia | Resource | 1st Training<br>Program |
| David M. Scott<br>1020 Lakeside Dr.<br>Columbia, Mo. 65201 | Resource | 1st Training<br>Program |
| W. Wayne Walker<br>Jefferson Jr. High School<br>North 8th St.<br>Columbia, Mo. 65201 | Resource | 1st Training<br>Program |
| O. V. Wheeler<br>Ridgeway Elem. School<br>Columbia Public School<br>System<br>1002 Range Line<br>Columbia, Missouri 65201 | Resource | 1st Training<br>Program |

# APPENDIX B

## Training Proposal for University of Missouri-Columbia

PILOT TRAINING PROJECT FOR PERSONNEL PARTICIPATING
IN PILOT STATE DISSEMINATION PROGRAMS

Proposed starting date: June 1, 1970
Proposed ending date: December 1, 1971

## THE PROPOSAL

### Introduction

The U. S. Office of Education proposes to fund three pilot state dissemination programs to assist those state education agencies "to accelerate the improvement of educational practice and the installation of tested innovations in programs by local school districts." These pilot dissemination programs will involve a staff for each of the selected states. The staff will include, in each instance, a director, a two or three person reference and retrieval staff, and field agents.

To accomplish the goals established in these pilot projects, a thorough training program for the staff must be conducted. This proposal is for such a training program.

The abilities of the University of Missouri-Columbia to effectively conduct this training program are evidenced by the following:

1. The long history of successfully functioning as a dissemination system through its nationally recognized Extension Division as well as the availability as an advisor of Dr. C. B. Ratchford, Vice President for Extension, whose administrative and leadership abilities are internationally recognized with regard to Extension (dissemination) systems.

2. The successful operation of an extension program for professionals as offered by the Education Extension program of the College of Education at the University of Missouri-Columbia (and other programs from other colleges as well).

3. The Library Science undergraduate and graduate programs and the adequate library facilities and staff who have long and varied experience in data collection, retrieval, cataloging, etc.

4. The successful development during the past three years of the Industrial Referral Center within the College of Engineering to assist industry in a manner similar to that proposed in these pilot programs to state education agencies. Their success in working with the Linda Hall Library is an excellent example of cooperation.

5. Staff who might be available (at least as consultants) who are recognized in selected areas as per example:

Dr. Herbert Lionberger in the field of Communication and Dissemination of information; Dr. Ralph Parker, Dean of the School of Library and Informational Science; Dr. Daryl Hobbs, in Evaluation procedures; and Dr. William Hedges in Curriculum Development.

6. Successful and long experience in conducting in-service training programs for the approximately 400 Extension Division employees who function successfully as change agents over the state and who can assist if field trips or "on the job" type experience seems needed in the training program.

Problems and Objectives

A critical component in bringing about change in the approaches to teaching and learning is in-service or continuing education for the teachers who are going to participate in the execution of an innovative project. Inasmuch as this proposed state dissemination program will be something new, both to the state education agencies and the personnel whom they employ to carry out the programs, the success of these pilot programs will be dependent, in a very large measure, upon the preparation of the staff to meet the new kinds of problems and opportunities with which they will be confronted in carrying out the programs. Therefore, the provision for preservice and in-service education for the staff of the state education agencies is considered to be an essential component in the total systematic approach relating to the dissemination of information and to the acceleration fo the process of change.

This program to train personnel for these pilot state programs must also be considered as a pilot program. A number of the dimensions are not known at the present time and cannot be until the pilot states are designated and staff are employed. Furthermore, it seems presumptious to try to list at this time the specific topical and programatic components in detail which will be carried on in the training program. The training program must be geared to identified needs of the participants based upon their previous background, their respective roles in the pilot programs, the nature of their assignments in terms of geography and subject areas, and the history and nature of the clientele whom they are to serve. These data can be determined only after the pilot states are named.

The fundamental problem is to design a training program which will meet the needs of the proposed pilot dissemination staffs. The overall objective is to provide the staff with the knowledge, attitudes, and skills requisite to maximum success in carrying out the state dissemination programs. The following are indications of the types of behavior which should be developed as a result of the program.

For all trainee staff to be able to:

1. Construct a systems design for the dissemination of information.

2. Describe and categorize the essential components in the change process.

3. Function as a team in approaching information dissemination.

4. Understand and practice the problem solving process with specific kinds of problems from awareness, to data collection, to alternative solutions, to consensus, to implementation, and to reinforcement.

5. Communicate effectively in verbal and written language and in non-verbal language.

6. Develop rapport with a group and to engage effectively in group processes.

7. Identify the educational power structure in the state in which they function and also in the geographic areas which are target areas for consideration.

8. Describe presisely the organization of education in the states in which they function.

9. Identify the obstructions and deterents to the execution of the programs on which they will work.

10. Formulate a plan of action, develop a system for continuing assessment of this plan of action, and develop a program of communication both for the plan of action and for its evaluation.

The project director should be able to:

1. Function successfully as an administrator including specifics such as - prepare and administer a budget, delegate responsibility, utilize staff in the decision-making process, conduct staff meetings and supervise staff.

2. Describe and understand the ERIC system and other pertinent systems useful to the dissemination process.

3. Develop a system for acquiring and utilizing consultant expertise which includes identifying and developing means for using consultants. (This may more appropriately be a part of the responsibility of the Reference and Retrieval Staff but the Director may facilitate this.)

4. Recognize and diagnose problems in the dissemination and change process.

5. Develop a monitoring system for the program.

6. Allocate resources on a cost-probable benefit ratio.

7. Develop a system for staff and activity evaluation.

The Reference and Retrieval Staff Members should be able to:

1. Describe in detail the components, structure, and function of the data system.

2. Search the data system for information on specific programs.

3. Prepare reports on specific problems or questions utilizing the data system.

4. Identify, develop and correlate with existing data systems, a system for accumulating, providing access to, and disseminating information relating to projects and programs within the state which are not included in the information in current data systems.

5. Effectively catalog and cross reference materials of all kinds into the data systems.

6. Construct simplified, topical and subject oriented reference catalogs for use by the field agents.

7. Use effectively the services of secretaries and other sub-professionals in the search and dissemination process.

8. Identify and develop means for using consultants which include identifying expertise and competence of consultants and also the means for injecting these data into the system for appropriate use.

For Field Agents

In a very real sense much of the impact of the project will be dependent upon the ability of the field agent to sell himself and the services of the system to the people with whom he relates. Therefore, in addition to having the appropriate skills and abilities included above for the entire team, it is essential that the field agents be able to:

1. Conduct an interview effectively.

2. Develop rapport with individuals and groups.

3. Analyze problem situations, discover alternative solutions, and point possible directions.

4. Function as a catalyst. (change agent)

5. Demonstrate a working knowledge of newer developments in education such as modular scheduling, individually prescribed instruction, team teaching, autotutorial instruction, interaction analysis, use of nonverbal behavior, operant conditioning, et cetera.

6. Analyze a school community.

7. Construct a deliberate change system model, develop a plan for its implementation, and assess its probable chances of success with and without the inclusion of various alternative component factors.

Relationship of training program to objectives desired

Inasmuch as the training as well as the demonstration phase is pilot and since the objectives to be accomplished are relatively finite and the potential for training time and direction as well as competencies already possessed by potential trainees is almost infinite, it will be possible to accomplish the objectives only to the degree that the competencies already possessed by the trainees and the time allocations for such training allow the development of these behavioral competencies. Every effort will be made to provide maximum input of training experiences within reasonable time allowances for training, but limitations inherent in the nature of the program should be clearly recognized. The data which follow represent a careful assessment of the probable training needs within the framework of the guidelines for the development of this proposal. This format provides a recognition that training time is somewhat limited and it may be necessary to provide more time for the development of greater competencies in some areas than in others. This is due to the relatively critical nature of these particular tasks in relation to the competencies already possessed by the trainees.

DESCRIPTION OF ACTIVITIES

Step #1. Immediately upon funding of this proposal, the University of Missouri will employ the basic staff required to carry out the planning phase of the training proposal. This staff will, based upon objectives identified above and other objectives which become apparent, develop more specific objectives which relate to desired educational experiences. They will design a system which will provide for the acquisition of knowledge, attitudes and skills which relate to these experiences. The staff will develop a tentative training program which should attain the recognized objectives. They will collect and prepare material to be used in these educational and training experiences. This process will, in a sense, provide a reservoir of alternatives for the development of identified objectives through the use of specific kinds of training experiences. These tasks will be completed during the month of June.

Step #2. After the pilot state dissemination program states have been designated and staff employed, training staff will make site visits to each state engaged in the project to involve them in the curriculum development process and to determine which objectives should be attempted and which training materials and formats would be most appropriate for utilization in the initial training session.

In addition, information will be gathered concerning the SEA's, the proposed pilot programs the target areas to be served, and the qualifications of staff members assigned to each state.

Step #3. A curriculum for a one weeks training program will be developed to include specific kinds of learning experiences to accomplish the behavioral objectives identified for project directors, field agents, and reference and retrieval staff. The specific allocation of time for each of these will be determined after more of the exact needs are known.

Step #4. An initial 5 day training conference will be held on the campus of the University of Missouri-Columbia in August of 1970. The agenda, as indicated in Step 3, will be planned by the training staff in response to stated and discovered needs of the trainees, and will utilize the services of the project staff in addition to the services of other expert personnel depending upon identified need in fields such as: group dynamics, change theory, administration, library science, curriculum, learning theory, systems design, interviewing, extension field work, state technical services information dissemination center, et cetera.

A partial list of subject matter content might include:

Information Management - theory and practice - acquisition, classification, storage, retrieval, dissemination.
Structure and Operation of SEA's - interface with local school systems.
The role of the director - interface between SEA and Pilot Program Staff and local school officials.
Review objectives, structure, requirements and mode of operations in pilot programs.
Coordination and collaboration of the field agents, referral staff and consultants.
The role of the consultant of experts.
Problem solving techniques for field agents.
Preparing and maintaining collections of indexes and catalogs of exampiary programs.
Making use of ERIC collections.
Conducting interviews.
Preparing proposals and budgets.
Securing cooperation of local agencies and citizen groups.
Publicity.
Soliciting requests.
Conceptual and practical considerations in applying innovative solutions to problems.

Step #5. Following the initial training conference, trainees will return to their state to begin their programs. A second training conference of 3 to 5 days is proposed for mid-winter to assist trainees in:

1. Reporting and documenting problems encountered and to evaluate progress to date.

2. Follow-up training needed to strengthen and carry the project forward.

Step #6. A final conference of one week is proposed for June of 1971. It is important to conduct such a follow-up conference immediately after the close of the academic year. It seems desirable to hold this conference soon after the school year is over to achieve the maximum use of the perceptions, attitudes, problems, and insights of the participants while they are most vivid. The purpose of this conference will be to accomplish two main purposes:

1. To further report and document problems and to evaluate progress to date in the state programs. This session will provide a forum for the sharing of ideas between staff members of the different projects based upon experiences during the preceeding year. Research on innovation indicates that reinforcement is a vital part of the process innovation. Since this is an innovative project itself, the follow-up conference is a necessary reinforcement for the participants.

2. The second purpose will be to provide additional training for the participants to carry this program into the second year. This training will deal mainly with "gaps" which were not apparent in the initial training session.

Step #7. Site visits - Following the initial training period in August of 1970, each state will be visited before the mid-winter training programs. Additional visits will be made between the mid-winter and June, 1971 conferences and perhaps one visit in the second year. When desirable, time will be spent with the staff collectively at a convenient site within the state. On other occasions, it may be desirable to visit field staff at their field locations and reference and retrieval staff at their central location.
The purpose of these visits will be to determine, in part, the effectiveness of the training and to discover gaps, and possible errors in the training program as well as to provide additional consultations and training on problems which occur. In addition, regular correspon-

dence between training staff and state staff members will be maintained.

Step #8. A final report will be written and submitted to the agency during November of 1971 and the project will terminate on December 1, 1971.

ASSURANCE OF COMPLIANCE WITH THE DEPARTMENT OF
HEALTH, EDUCATION, AND WELFARE REGULATION UNDER
TITLE VI OF THE CIVIL RIGHTS ACT OF 1964

UNIVERSITY OF MISSOURI (hereinafter called the "Applicant")
(Name of Applicant)

HEREBY AGREES THAT it will comply with title VI of the Civil Rights Act of 1964 (P.L. 88-352) and all requirements imposed by or pursuant to the Regulation of the Department of Health, Educaion, and Welfare (45CFR Patt 80) issued pursuant to that title, to the end that, in accordance with title VI of the Act and the Regulation, no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Applicant received Federal financial assistance from the Department; and HEREBY GIVES ASSURANCE THAT it will immediately take any measures necessary to effectuate this agreement.

If any real property or structure thereon is provided or improved with the aid of Federal financial assistance extended to the Applicant by the Department, this assurance shall obligate the Applicant, or in the case of any transfer of such property, any transferee, for the period during which the real property or structure is used for a purpose for which the Federal financial assistance is extended or for another purpose involving the provision of similar services or benefits. If any personal property is so provided, this assurance shall obligate the Applicant for the period during which it retains ownership or possession of the property. In all other cases, this assurance shall obligate the Applicant for the period during which the Federal financial assistance is extended to it by the Department.

THIS ASSURANCE is given in consideration of and for the purpose of obtaining any and all Federal grants, loans, contracts, property, discounts or other Federal financial assistance extended after the date hereof to the Applicant by the Department, including installment payments after such date on account of applications for Federal financial assistance which were approved before such date. The Applicant recognizes and agrees that such Federal financial assistance will be extended in reliance on the representations and agreements made in this assurance, and that the Unived States shall have the right to seek judicial enforcement of this assurance. This assurance is binding on the Applicant, its successors, transferees, and assignees, and the person or persons whose signatures appear below are authorized to sign this assurance on behalf of the Applicant.

Dated April 15, 1970

University of Missouri
(Applicant)

By R. H. Bezoni
(President, Chairman of Board, or comparable authorized official)

Columbia, Missouri 65201
(Applicant's mailing address)

HEW-441
(12-64)

## PERSONNEL & FACILITIES

PERSONNEL:

Dr. Charles H. Koelling, Project Director, joined the Extension Division staff in 1959. He is Director of Continuing Professional Education.

Prior to joining the Extension Division staff, Kr. Koelling had considerable experience in Missouri school systems. In 1949-50 he was high school principal and teacher at King City; from 1950 to 1953 a junior high teacher in Brookfield; superintendent of Sturgeon schools from 1953 to 1957; and assistant professor of education at Central Missouri State College at Warrensburg during 1958 to 1959. In addition he has worked for the MK&T Railroad and served in the US Navy from 1944 to 1946.

Dr. Koelling is a graduate of the University of Kansas City (now the University of Missouri at Kansas City). He also holds M. Ed. and Ed. D. degrees in education granted by the University of Missouri.

FACILITIES:

The University of Missouri will provide necessary office space and classroom facilities to conduct this training program.

APPENDIX C

Table Of Intra-Project Communications

APPENDIX C

TABLE OF INTRA-PROJECT COMMUNICATIONS

| | LETTERS | | | | CALLS | | | | NEWS-LETTERS | REPRODUCED MATERIAL | | MATERIALS | | | QUES-TION-NAIR-ES | CONFER-ENCES |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Sent | | Rec. | | Made | | Rec. | | Rec. | Sent | Rec. | Pre-pared For | Sent | Rec. | Sent | Held |
| | P | C | P | C | P | C | P | C | | | | | | | | |
| Project Director | 43 | 10 | 20 | 44 | 29 | 4 | 5 | 1 | 4 | 4 | 0 | 1 | 10 | 12 | 3 | 0 |
| Field Agents | 16 | 3 | 10 | 4 | 4 | 1 | 1 | 1 | 3 | 2 | 0 | 0 | 5 | 2 | 0 | 0 |
| Retrieval Staff | 6 | 0 | 11 | 4 | 0 | 2 | 0 | 1 | 0 | 1 | 0 | 0 | 5 | 3 | 0 | 0 |
| U.S.O.E. | 8 | 4 | 1 | 4 | 4 | 1 | 1 | 1 | 1 | 15 | 0 | 0 | 6 | 1 | 0 | 0 |
| Potential Trainers or Resource People | 51 | 11 | 13 | 12 | 13 | 4 | 2 | 1 | 0 | 2 | 3 | 1 | 9 | 12 | 2 | 4 |
| Training Staff | 48 | 17 | 11 | 19 | 20 | 2 | 5 | 2 | 0 | 41 | 0 | 5 | 12 | 6 | 3 | 22 |
| Evaluation Staff | 19 | 5 | 7 | 13 | 4 | 1 | 1 | 0 | 0 | 17 | 0 | 1 | 9 | 7 | 0 | 1 |

C - Content
P - Procedural

APPENDIX D

First Training Program For Retrieval Staff and Project Directors;
For Field Agents and Project Directors

UNIVERSITY OF MISSSOURI-COLUMBIA

# PILOT TRAINING PROJECT FOR PERSONNEL PARTICIPATING IN PILOT STATE DISSEMINATION PROGRAM

## FIRST TRAINING PROGRAM FOR WEEK OF OCTOBER 19-23, 1970

*FOR FIELD AGENTS AND PROJECT DIRECTORS*

Charles H. Koelling, Director
Carl C. Fehrle, Associate Director

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*MONDAY, OCTOBER 19,1970*

| *Time* | *Activity* | *Leader* | *Room Memorial Union* |
|---|---|---|---|
| 8:00 | Presiding | Carl C. Fehrle | S-4 |
| 8:05 | Welcome | John F. McGowan | |
| 8:10 | Welcome | Bob G. Woods | |
| | Introduce Advisory Committee | | |
| 8:15 | History of the Project | John Coulson | |
| 8:45-11:15 | [Participation Training | Ralph Dobbs and | S-4 |
| 9:00-9:45 | [Problem Inventory and Introduction | Steve Douglas | S-2 |
| 9:45-10:00 | [Orientation to Participation Learning | | |
| 10:00-10:15 | [Exploring the Nature of Group Participation | | |
| 10:15-10:45 | [Training in Group Teamwork Participation | | |
| 10:45-11:30 | [Repeat above session | | |
| 11:30-12:00 | [Reassemble for report and critique sessions | | |
| | *BUFFET LUNCHEON* | *Charles H. Koelling, Presiding* | *N-222* |
| 1:15-2:30 | Motivating People | Schell Boienhamer | S-4 |
| 2:30-2:45 | Break | | |
| 2:45-4:30 | Creating and Accepting Change | Daryl Hobbs | S-4 |
| 4:30-5:00 | State Meetings<br>Written Evaluation of day by each Project Director | South Carolina<br>Charles Koelling and Daniel Doell<br>Oregon<br>Randel Price and Glenn White<br>Utah<br>Larry Hale and William Hoff | S-3<br><br>S-2<br><br>S-4 |
| 7:00-9:00 | Film Festival<br>Films will be previewed in both rooms | | S-6<br>S-8 |



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| Time | Activity | Leader | Room Memorial Union |
|---|---|---|---|
| | Presiding | Carl C. Fehrle | S-4 |
| 8:00-9:15 | Teamwork | Charles H. Koelling | S-4 |
| 9:15-9:30 | Break | | |
| 9:30-11:30 | Overview of the Industrial Referral Center | William Hoff | S-4 |
| 11:30-12:30 | *LUNCH (on your own at Hawthorne Room or Cafeteria)* | | |
| | Presiding | Charles H. Koelling | S-2 |
| 1:00-2:30 | How to open the door!<br>How to keep the door open! | David Scott<br>Bill Owsley | S-2<br>S-2 |
| 2:30-4:00 | Field agents interview the three Missouri administrators. The administrators will state several problem areas to research. This will be given to the retrieval members at the state meetings. | Oregon - O. V. Wheeler<br>South Carolina-W. Wayne Walker<br>Utah-Ralph King | S-4<br>S-3<br>S-2 |
| 4:00-5:00 | State Teams Meet<br>Field agents discuss the problems to be researched. | South Carolina<br>Charles Koelling and Daniel Doell<br>Oregon<br>Randel Price and Glenn White<br>Utah<br>Larry Hale and William Hoff | S-3<br><br>S-2<br><br>S-4 |
| 7:00-9:00 | O P E N | | |

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Visit Room 213 at the Library. Mrs. Margaret Brewer has many reference books on display. Arrangements have been made for you to check out these books during your stay in Columbia, Missouri.

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| Time | Activity | Leader | Room Memorial Union |
|---|---|---|---|
| 8:00-8:30 | Project Directors Report To Training Group | W.E. Ellis, George Katagiri, Kenneth Lindsay | S-208 |
| 8:30-9:45 | Project Directors Informal Session | Charles Koelling, Larry Hale, Randel Price | S-110 |
| | Presiding | Randel Price | |
| 8:30-8:40 | [General Discussion | Delmar Hatesohl | S-208 |
| 8:40-8:50 | [Record three biggest problems relating to communication. | | |
| 8:50-9:30 | [Three Models | Dick Lee | S-208 |
| 9:30-9:40 | [BREAK | | |
| 9:40-9:55 | [Movie | Delmar Hatesohl | S-208 |
| 9:55-10:10 | ["More Than Words", 15 minutes | | |
| 10:10-11:15 | Sharpening your writing: How to attract the reader. What makes it easy to understand? | Delmar Hatesohl | S-208 |
| 11:15-12:00 | Process of Acceptance. Awareness-Interest-Evaluation-Trial-Adoption | | |
| 12:00-1:00 | *LUNCH (on your own-Hawthorne Room or Cafeteria)* | | |
| | Presiding | Donald Fancher | |
| 1:00-1:45 | [Continue working with mass media | | S-208 |
| 1:45-3:00 | [Learning to Listen | Dick Lee | S-208 |
| 3:00-4:00 | [Slide presentation on using ERIC | Glenn White | S-208 |
| | [Stating the question. | | |
| 4:00-5:00 | State teams meet. Written evaluation of each day made by Project Director. | South Carolina<br>Charles Koelling and Daniel Doell | S-16 |
| | Check progress on retrieving the information for the Missouri administrator. | Oregon<br>Randel Price and Glenn White | S-208 |
| | | Utah<br>Larry Hale and William Hoff | S-110 |

*6:30 p.m.* *BANQUET-FLAMING PIT. SPEAKER: VICE-PRESIDENT RATCHFORD*
*MASTER OF CEREMONIES: CHARLES KOELLING*

| Time | Activity | Leader | Room Memorial Union |
|---|---|---|---|
| 8:00 | Project Directors Reports to the Training Group | W.E. Ellis<br>George Katagiri<br>Kenneth Lindsay | S-4 |
| | Presiding | Larry Hale | |
| 8:30-9:45 | Ways At Looking At A School | Dixie Kohn | S-2 |
| 9:45-10:00 | BREAK | | |
| 10:00-11:45 | Problem Solving in the Public School Environment | Leo Grebe | S-2 |
| *11:45-1:00* | *BUFFET LUNCHEON* | | *N-222* |
| | Presiding | Larry Hale | |
| 1:00-2:30 | Conflict Management | Fred List | S-2 |
| 2:30-4:00 | Life As A Field Agent: Completing Reports | William McMahill | S-2 |
| 4:00-5:00 | State Meetings | South Carolina<br>Charles Koelling and Daniel Doell | S-3 |
| | | Oregon<br>Randel Price and Glenn White | S-2 |
| | | Utah<br>Larry Hale and William Hoff | S-4 |
| 7:00-9:00 | Retrieval staff, Field Agents and Project Directors will visit Computer Center, State Department of Education, Jefferson. Retrieval staff will receive print out of information for submitted question and will screen and interpret findings to the Field Agent. | | |

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| Time | Activity | Leader | Room Memorial Union |
|---|---|---|---|
| 8:00-8:30 | Project Directors Reports to the Training Group | W.E. Ellis<br>George Katagiri<br>Kenneth Lindsey | S-6 |
| | Presiding | Carl C. Fehrle | |
| 8:30-~~9:30~~ 9:00 | Feed back information from the Retrieval Staff-Field Agent-School Administrator | Utah<br>South Carolina<br>Oregon | S-6<br>S-7<br>S-8 |
| 9:00-10:30 ~~9:40-11:00~~ | Public Relations | Frank Haegerty | S-6 |
| ~~11:00-12:00~~ | ~~O P E N~~ | | |
| ~~12:00-1:00~~ | ~~LUNCH (on your own in Hawthorne Room or Cafeteria)~~ | | |
| | ~~Presiding~~ | Donald Fancher | |
| 10:30-11:30 ~~1:00-2:00~~ | Future in Educational Technology (Teaching and Learning) | William D. Hedges | S-6 |
| 12:00 ~~2:30~~ | A D J O U R N | | |

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UNIVERSITY OF MISSOURI-COLUMBIA

# PILOT TRAINING PROJECT FOR PERSONNEL PARTICIPATING IN PILOT STATE DISSEMINATION PROGRAM

## FIRST TRAINING PROGRAM FOR WEEK OF OCTOBER 19-23, 1970

*FOR RETRIEVAL STAFF AND PROJECT DIRECTORS*

Charles H. Koelling, Director
Carl C. Fehrle, Associate Director

MONDAY, OCTOBER 19, 1970

| Time | Activity | Leader | Room Memorial Union |
|---|---|---|---|
| 8:00 | Presiding | Carl C. Fehrle | S-4 |
| 8:05 | Welcome | John F. McGowan | |
| 8:10 | Welcome | Bob G. Woods | |
| | Introduce Advisory Committee | | |
| 8:15 | History of the Project | John Coulson | |
| 8:45-11:15 | [Participation Training | Ralph Dobbs and Steve Douglas | S-4 |
| 9:00-9:45 | [Problem Inventory and Introduction | | S-2 |
| 9:45-10:00 | [Orientation to Participation Learning | | |
| 10:00-10:15 | [Exploring the Nature of Group Participation | | |
| 10:15-10:45 | [Training in Group Teamwork Participation | | |
| 10:45-11:30 | [Repeat above session | | |
| 11:30-12:00 | [Reassemble for report and critique sessions | | |
| | *BUFFET LUNCHEON* | *Charles H. Koelling, Presiding* | N-222 |
| 1:15-2:30 | Motivating People | Schell Boienhamer | S-4 |
| 2:30-2:45 | Break | | |
| 2:45-4:30 | Creating and Accepting Change | Daryl Hobbs | S-4 |
| 4:30-5:00 | State Meetings<br>Written Evaluation of day by each Project Director | South Carolina<br>Charles Koelling and Daniel Doell | S-3 |
| | | Oregon<br>Randel Price and Glenn White | S-2 |
| | | Utah<br>Larry Hale and William Hoff | S-4 |
| 7:00-9:00 | Film Festival<br>Films will be previewed in both rooms | | S-6<br>S-8 |

TUESDAY, OCTOBER 20, 1970

| Time | Activity | Leader | Room Memorial Union |
|---|---|---|---|
| | Presiding | Carl C. Fehrle | S-4 |
| 8:00-9:15 | Teamwork | Charles H. Koelling | S-4 |
| 9:15-9:30 | Break | | |
| 9:30-11:30 | Overview of the Industrial Referral Center | William Hoff | S-4 |
| 11:30-12:30 | *LUNCH (on your own at Hawthorne Room or Cafeteria)* | | |
| 12:30-2:10 | Building the Data Bank | William Hoff | S-4 |
| 2:25-4:00 | ERIC/CRIER | A. Sterl Artley | Library 208 |
| 4:00-5:00 | State Meetings<br>Field Agents discuss the problems to be researched | Oregon<br>Randel Price and Glenn White<br>South Carolina<br>Charles Koelling and Daniel Doell<br>Utah<br>Larry Hale and William Hoff | S-2<br><br>S-3<br><br>S-4 |
| 7:00-9:00 | O P E N | | |

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Visit Room 213 at the Library. Mrs. Margaret Brewer has many reference books on display. Arrangements have been made for you to check out these books during your stay in Columbia, Missouri.

WEDNESDAY, OCTOBER 22, 1970

| Time | Activity | Leader | Room Memorial Union |
|---|---|---|---|
| 8:00-8:30 | Project Directors Report to Training Group | W. E. Ellis<br>George Katagiri<br>Kenneth Lindsay | S-208 |
| | Presiding | Carl C. Fehrle | |
| 8:30-10:45 | Development of Information System<br>Slide Presentation<br>Question Analysis<br>A. Examples of Requests<br>B. Formulating Descriptive Terms | Glenn White | S-16 |
| 11:00-12:00 | Other Sources | Margaret Brewer | Library |
| 12:00-1:00 | *LUNCH (on your own at Hawthorne Room or Cafeteria)* | | 213 |
| | Presiding | C. Edward Carroll | |
| 1:00-2:00 | Locating Sources | Margaret Brewer will assist | Library |
| 2:00-4:00 | Questions about Data Bank<br>Policy Procedure<br>Routing Follow-up (will design a plan which will be duplicated for distribution)<br>Record Keeping (will design a plan which will be duplicated for distribution) | William Hoff | S-16 |
| 4:00-5:00 | State Meetings. Written evaluation of each day made by Project Director. Check progress on retrieving the information for the Missouri administrators | South Carolina<br>Charles Koelling and Daniel Doell<br>Oregon<br>Randel Price and Glenn White<br>Utah<br>Larry Hale and William Hoff | S-16<br><br>S-208<br><br>S-110 |

*6:30 p.m.*
*BANQUET-FLAMING PIT. SPEAKER: VICE-PRESIDENT C.B. RATCHFORD*
*MASTER OF CEREMONIES: CHARLES H. KOELLING*

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THURSDAY, OCTOBER 22, 1970

| Time | Activity | Leader | Room Memorial Union |
|---|---|---|---|
| 8:00-8:30 | Project Directors Report to Training Group | W. E. Ellis<br>George Katagiri<br>Kenneth Lindsay | S-4 |
| | [DATA INSTRUMENT DESIGN<br>[Each retrieval staff will design one with the assistance of the project director] | | |
| 8:30-9:00 | [Structure | | |
| 9:00-10:00 | [Design survey | | |
| 10:00-10:10 | [BREAK | | |
| 10:10-11:15 | [Presenting Surveys<br>[Designed by Retrieval Staffs | | |
| 11:15-11:45 | [Rework original survey and make final copy | | |
| 11:45-1:00 | *BUFFET LUNCHEON (Small Ballroom - Memorial Union* | | |
| 1:15-2:15 | How Do You Tap Other Resources | William Hoff | N-222 |
| 2:15-2:30 | BREAK | | |
| 2:30-4:00 | Questions and Answers<br>(If additional time permits, do additional research on questions submitted by the Field Agents) | Margaret Brewer<br>Daniel Doell<br>William Hoff<br>Glenn White | S-4 |
| 4:00-5:00 | State Meetings | Oregon<br>Randel Price and Glenn White | S-2 |
| | | South Carolina<br>Charles Koelling and Daniel Doell | S-3 |
| | | Utah<br>Larry Hale and William Hoff | S-4 |
| 7:00-9:00 | Retrieval Staff, Field Agents and Project Directors will visit the Computer Center, State Department of Education, Jefferson City. Retrieval Staff will receive print out of information for submitted question and will screen and interpret findings to the Field Agents. | | |

| Time | Activity | Leader | Room Memorial Union |
|---|---|---|---|
| 8:00-8:30 | Project Directors Reports to the Training Group | W.E. Ellis<br>George Katagiri<br>Kenneth Lindsey | S-6 |
| | Presiding | Carl C. Fehrle | |
| 8:30-~~9:30~~ 9:00 | Feed back information from the Retrieval Staff-Field Agent-School Administrator | Utah<br>South Carolina<br>Oregon | S-6<br>S-7<br>S-8 |
| ~~9:40-11:00~~ 9:00-10:30 | Public Relations | Frank Haegerty | S-6 |
| ~~11:00-12:00~~ | ~~O P E N~~ | | |
| ~~12:00-1:00~~ | ~~LUNCH (on your own in Hawthorne Room or Cafeteria)~~ | | |
| | ~~Presiding~~ | Donald Fancher | |
| ~~1:00-2:00~~ 10:30-11:30 | Future in Educational Technology (Teaching and Learning) | William D. Hedges | S-6 |
| ~~2:30~~ 12:00 | A D J O U R N | | |

WHO'S WHO

*A. Sterl Artley, Professor of Education, University of Missouri-Columbia.

Schell H. Bodenhamer, Associate Dean, College of Agriculture, University of Missouri-Columbia.

Margaret L. Brewer, Assistant Librarian, University of Missouri-Columbia.

*C. Edward Carroll, Director University Library, University of Missouri-Columbia.

John M. Coulson, Research Associate, Division of Practice Imporvement, National Center of Educational Communication, Department of Health, Education and Welfare, Washington, D.C.

Ralph C. Dobbs, Associate Professor of Education, University of Missouri-Columbia.

Daniel Doell, Assistant Librarian, University of Missouri-Columbia.

Steve Douglas, Program Coordinator, Conferences and Institutes, University of Missouri-Rolla.

*Donald W. Fancher, Assistant Dean of Extension, University of Missouri-Columbia.

Carl C. Fehrle, Associate Director and Associate Professor of Education, University of Missouri- Columbia.

Leo Grebe, former Director, Title III Southwest Improvement Center.

*Larry A. Hale, Consultant for University Extension, University Wide Extension, University of Missouri.

Delmar E. Hatesohl, Associate Agricultural Editor and Professor of Extension Education, University of Missouri-Columbia.

Frank Heagerty, Professor of Education, University of Missouri-Columbia.

William D. Hedges, Professor of Education and Chairman, Department of Curriculum and Instruction, Univeristy of Missouri-Columbia.

Daryl H. Hobbs, Associate Professor of Sociology, University of Missouri-Columbia.

*William W. Hoff, Coordinator, Industrial Reference Center, Extension Division, University of Missouri-Columbia.

Ralph King, Superintendent, Hallsville Public Schools, Hallsville, Missouri.

Charles H. Koelling, Project Director and Professor of Education, Director of Continuing Professional Education, University of Missouri-Columbia.

Dixie Kohn, Director of Laboratory School and Associate Professor of Education, University of Missouri-Columbia.

Richard Lee, AgEditor and Professor of Extension Education, University of Missouri-Columbia.

Fred List, Associate Professor of Regional and Community Affairs, University of Missouri-Columbia.

John F. McGowan, Dean of Extension Division and Professor of Education, University of Missouri-Columbia.

William McMahill, Industrial Extension Specialist, University of Missouri Extension Center.

William H. Owsley, Representative, Silver Burdett Company, Columbia, Missouri.

*Randel Price, Professor of Extension Education and Department Chairman and Director Training and Staff Development, University of Missouri-Columbia;

Charles B. Ratchford, Professor of Agricultural Economics and Vice-President for Extension, University of Missouri.

David M. Scott, Representative, Scott Foresman and Company, Columbia, Missouri.

W. Wayne Walder, Principal, Columbia Public Schools, Columbia, Missouri.

O.V. Wheeler, Principal, Columbia Public Schools, Columbia, Missouri.

Glenn White, Director of Research, State Department of Education, Division of Public Schools, Jefferson City, Missouri.

WHO'S WHO (Page 3)

Bob G. Woods, Dean, College of Education and Professor of Education, University of Missouri-Columbia.

(*Member of Advisory Committee)

# APPENDIX E

## Questionnaire to Retrieval People

Name_____

CONTENTS


INTRODUCTION

OBJECTIVES

ASSUMPTIONS

DESIGN OF CONTENT

UNIT I. INTRODUCTION

UNIT II. DEVELOPING CONDITIONS FOR MAXIMUM DISSEMINATION

UNIT III. USE OF RESEARCH RESOURCES

UNIT IV. FIELD TRIP

UNIT V. PROGRAM DEVELOPMENT FOR INFORMATION DISSEMINATION

UNIT VI. COOPERATIVE PROGRAMS FOR INFORMATION DISSEMINATION


PRETRAINING QUESTIONNAIRE FOR RETRIEVAL STAFF

OBJECTIVES:

1. To provide a body of knowledge of the tools for information dissemination.

2. To develop skills in use of the research tools necessary for information dissemination.

3. To formulate proper attitudes for programatic retrieval development.

4. To foster and/or implement dissemination program development.

ASSUMPTIONS BASED ON STATE PROJECT RESUMES:

1. Each state is unique in these affecting respects:

   a. Socio-economic conditions

   b. Educational level (NEA rating of the states)

   c. Resource allocations

2. State Departments of Education are structured differently.

3. Purposes of education vary.

4. Each state has tried various means of improving educational practices through inservice or continuing education programs.

5. Each state desperately wants to improve the quality of education.

| | Unknown | Need much training | Familiar | Need little training | Known | Need no training |
|---|---|---|---|---|---|---|
| UNIT I. INTRODUCTION | | | | | | |
| A. Theoretical Basis for Dissemination of Information | | | | | | |
| 1. Review of pertinent literature<br>a. Books<br>b. Research studies<br>c. Documents | | | | | | |
| 2. Purposes of project<br>a. Historical aspects<br>b. Theoretical treatment | | | | | | |
| 3. Development of Plan<br>a. Outline steps of planning<br>b. Discuss chart for planning | | | | | | |
| B. Practical Basis for Dissemination of Information | | | | | | |
| 1. Review of Research evidence<br>a. Research in theses and Dissertations<br>b. Research in ERIC<br>c. Research in government publications | | | | | | |
| 2. Development of needs of each state<br>a. Educational organization of each state department<br>b. Anticipated organization for dissemination of information as ERIC linker | | | | | | |

| UNIT II. DEVELOPING CONDITIONS FOR MAXIMUM DISSEMINATION | Unknown | Need much training | Familiar | Need little training | Known | Need no training |
|---|---|---|---|---|---|---|
| A. Selection of information resources | | | | | | |
| 1. Who should select | | | | | | |
| 2. How should selections be made | | | | | | |
| 3. When and the frequency of selections | | | | | | |
| 4. Principles of selection | | | | | | |
| 5. Resources recommended for initial purchase | | | | | | |
| B. Acquisitions | | | | | | |
| 1. Development of an acquisitions program | | | | | | |
| 2. Acquisition means | | | | | | |
| a. Purchase | | | | | | |
| b. Lease or rent | | | | | | |
| c. Cooperative agreements with institutions and firms | | | | | | |
| C. Processing and Classification | | | | | | |
| 1. System based on available facilities | | | | | | |
| a. Computer | | | | | | |
| b. Card catalog | | | | | | |
| 2. Computer processing and classification | | | | | | |
| a. ERIC | | | | | | |
| b. Government documents | | | | | | |
| 3. Card catalog (typical library scheme) | | | | | | |
| a. Review of Fitch study | | | | | | |
| b. Application of Brewer/Willis technique | | | | | | |
| c. Flexowriter use in card production | | | | | | |

(Continued)

UNIT II. DEVELOPING CONDITIONS FOR MAXIMUM DISSEMINATION (Continued)

| | Need no training | Known | Need little training | Familiar | Need much training | Unknown |
|---|---|---|---|---|---|---|
| D. Storage | | | | | | |
| 1. Physical conditions<br>a. Space<br>b. Humidity control<br>c. Ventilation/heat controls | | | | | | |
| 2. Equipment<br>a. Expansion considered | | | | | | |
| 3. Arrangements of materials<br>a. By type<br>b. By code numbers | | | | | | |
| 4. Accessibility<br>a. Accessible to personnel at all times for use<br>b. Filing and revising access | | | | | | |
| E. Retrieval of Information | | | | | | |
| 1. Human<br>a. Hand serach of card files<br>b. Rod devices | | | | | | |
| 2. Computer search<br>a. Thesaursus<br>b. Limitation of word descriptors | | | | | | |
| F. Guided Tours | | | | | | |
| 1. Library's data process/computer areas (primarily to illustrate lectures)<br>2. Data Processing Center (equipment and storage purposes) | | | | | | |

| UNIT III. USE OF RESEARCH RESOURCES | Unknown | Need much training | Familiar | Need little training | Known | Need no training |
|---|---|---|---|---|---|---|
| A. ERIC | | | | | | |
| 1. U. S. Educational Research information Center. *Office of Education Research Reports 1956-1965* | | | | | | |
| 2. *Research in Education, 1966* | | | | | | |
| 3. *Current Index to Journals in Education, 1956* | | | | | | |
| 4. *Thesaurus of ERIC Descriptors, 2nd Edition* | | | | | | |
| B. THESES AND DISSERTATIONS | | | | | | |
| 1. U. S. Office of Education, *Bibliography of Research in Education, 1926-1940* | | | | | | |
| 2. Phi Delta Kappa, *Research Studies in Education, 1940-* | | | | | | |
| 3. *Dissertation Abstracts, 1937-* | | | | | | |
| 4. *Master's Theses in Education, 1951-* | | | | | | |
| C. PERIODICALS | | | | | | |
| 1. Education Index, 1929- | | | | | | |
| 2. *Psychological Index, 1894-1930* | | | | | | |
| 3. *Psychological Abstracts, 1927-* | | | | | | |
| 4. State Education Journal Index, 1963- | | | | | | |
| D. DOCUMENTS | | | | | | |
| 1. *U. S. Government Documents Catalog T887-* | | | | | | |
| 2. U. S. Library of Congress, *Monthly Checklist of State Publications* | | | | | | |
| 3. *U. S. Legislative Research Service* | | | | | | |

(Continued)

UNIT III. USE OF RESEARCH RESOURCES (Continued)

E. LABORATORY EXPERIMENT

| | Unknown | Need much training | Familiar | Need little training | Known | Need no training |
|---|---|---|---|---|---|---|
| 1. Each participant use packet. | | | | | | |
| 2. Identify problem. | | | | | | |
| 3. Develop search procedure. | | | | | | |
| 4. Select ERIC descriptors. | | | | | | |
| 5. Randomly choose one person's work, send to Jefferson City (Glenn White) by teletype; computer print-out will have been run by field trip following day to Jefferson City, State Department of Education. | | | | | | |

| | Need no training | Known<br>Need little training | Familiar<br>Need much training | Unknown |
|---|---|---|---|---|
| UNIT IV. FIELD TRIP | | | | |
| A. Introduction to Missouri's Plan<br>1. Background<br>2. Education for linkage | | | | |
| B. Review of ERIC<br>1. Slide presentation<br>2. Examples of types of requests | | | | |
| C. Explanation of Dissemination Process<br>1. Solicitation of requests<br>2. Receipt of requests<br>3. Search routines<br>4. Coding<br>5. Computer arrangement<br>6. Storage of tapes, discs<br>7. Storage of fiche | | | | |
| D. Tour of computer area | | | | |
| E. Assimilation and discussion | | | | |

| UNIT V. PROGRAM DEVELOPMENT FOR INFORMATION DISSEMINATION | Need no training | Known | Need little training | Familiar | Need much training | Unknown |
|---|---|---|---|---|---|---|
| A. Introduction | | | | | | |
| 1. Problems faced by linker<br>a. Overload<br>b. Marginality (go-between person)<br>c. Lack of recognized precedence | | | | | | |
| B. Linking Institution | | | | | | |
| 1. Advantages of permanent linking<br>a. Security<br>b. Identity<br>c. Coordinating<br>d. Specialization | | | | | | |
| 2. Ideal functions of a linker<br>a. Anticipate or sense need of clients<br>b. Gather all information from resource system<br>c. Select only salient elements<br>d. Present to client in readable-digestible form.<br>e. Provide counsel on use of information | | | | | | |
| C. Perfecting the Dissemination Program | | | | | | |
| 1. Instruct members of state department of education.<br>a. Use of ERIC<br>b. Supervisory research | | | | | | |
| 2. State supervisors reach local schools<br>a. Colleagues<br>b. Informal | | | | | | |

(Continued)

3. Problems
   a. Linker is outsider
   b. Must work through local agent
   c. Local agent transmits data to colleagues
   d. Regional centers tend to be top-heavy and ineffective

| Unknown |
| --- |
| Need much training |
| Familiar |
| Need little training |
| Known |
| Need no training |

| UNIT VI. COOPERATIVE PROGRAMS FOR INFORMATION DISSEMINATION | Unknown | Need much training | Familiar | Need little training | Known | Need no training |
|---|---|---|---|---|---|---|
| A. Characteristics of one-stop information center | | | | | | |
| 1. Familiarity with organized sources | | | | | | |
| 2. Knowledge of information and specific data concerning time required to retrieve information, format, and cost. | | | | | | |
| 3. Assistance to be used in translating information. | | | | | | |
| 4. Knowledge of user needs. | | | | | | |
| 5. Linkage with various information systems. | | | | | | |
| 6. Linkage of information processors, researchers, trainers, and change agents leading to articulation. | | | | | | |
| 7. Development of training programs to prepare individuals for change-agent roles | | | | | | |
| B. Institutional Cooperation | | | | | | |
| 1. State Library | | | | | | |
| a. Public library network | | | | | | |
| b. Cooperation with other state libraries | | | | | | |
| c. Regional libraries | | | | | | |
| 2. University Library Systems | | | | | | |
| a. Universities | | | | | | |
| b. Colleges (4-year, technical, community, junior) | | | | | | |
| 3. Private Institutions | | | | | | |
| a. Libraries | | | | | | |
| b. Business firms | | | | | | |

# APPENDIX F

## Simulation Problem For First Training Program

*INFORMATION AND DISSEMINATION SIMULATION - A LONGITUDINAL ACTION PROGRAM FOR THE WEEK OF OCTOBER 19 INVOLVING PROBLEM IDENTIFICATION, INFORMATION SYSTEM INTERROGATION, RETRIEVAL, AND FEED-BACK*

Within certain limitations relating to time factors, logistics, and human factors, an action project has been designed to run longitudinally through the first week of the Training Session of October 19 which will involve the field agents and retrieval staffs. You will note that on your program for the field agents on Tuesday afternoon a time has been provided for them to interview three school administrators. These three administrators will be represented by an elementary school principal and a junior high school principal from the City of Columbia and a superintendent of schools from a smaller community, Hallsville, Missouri. It is anticipated that the field agents from Utah will interview the superintendent of schools from Hallsville, the field agents from Oregon will interview the elementary school principal from Columbia, and the field agents from South Carolina will interview the junior high school principal from Columbia. It is suggested that all field agents attend the interview but that one field agent be designated to carry on the actual interview itself with the other field agents as observers.

During this interview it should be assumed that each of these school administrators will have been informed by letter from the Office of the Superintendent of Schools that this project has been initiated in this area. This will be the first time that the field agent has met this particular school administrator and it will be necessary, therefore, to make an introduction, establish some basis for communication and rapport, attempt to provide an awareness on the part of the administrator as to how this project, and particularly the field agent, can help the school administrator, and hopefully zero in on a problem or set of problems which can ultimately be narrowed down to something interrogatable in the literature.

Following this session the problems collected or the area of information needed will be stated by the field agents and turned over to the retrieval staff from their respective states. It is expected that the retrieval staffs will then make some appropriate search of the literature between Tuesday afternoon and Friday morning so as to turn over something in the way of documentation to the field staff in order for them to deliver the goods to the same administrators on Friday morning as is indicated by the schedule. The facilities of the University Library will be available day and evening for the retrieval staff to work and some computer time for the interrogation of the ERIC materials will be available also. On Wednesday morning the retrieval staff will be assisted in writing the question. These will be run on the computer at Jefferson City and the print-outs will be ready for screening by Thursday evening.

The field agents will then (hopefully) have something to bring back to the school administrators at the scheduled time on Friday

morning and discuss with them where they go from there.

We realize that this is quite a squeeze considering the time available, all the other things scheduled during the week, and the limitations on human energies. However, if everyone will give it the old college try there will be an opportunity for gathering some new insights into the operational process of the whole program and the distinct possibility of having some fun in the process.

October 14, 1970

# APPENDIX G

## Bibliography of Materials For The Pilot Training Project

Appendix G

Bibliography of Materials for the Pilot Training Project


Adult Education (Journal of Research - current issue) by A.E.A. of U.S.A., 1225 19th Street N.W., Washington D.C., 20036

Adult Leadership (current issue) by A.E.A. of U.S.A., 1225 19th N.W., Washington D.C. 20036

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## AUDIO VISUAL MATERIALS

Cassette Tapes:

National Center of Audio Visual
Bureau of Audio Visual Instruction
Stadium Building - Room 319
University of Colorado
Boulder, Colorado 80302

Automation and Information Retrieval

Impact of Automation on Communication

Impact of Information Processing on Society

Motivation Inherent in Information Processing

Case Study of Scientific Thinking

How People Change

Challenge of Automation for Education

Education for Leadership

Impact of Automation in the Classroom

Films:

Change Training Teacher for Innovation
28 Minutes long - 16 mm
Institute for Development of Educational Activities
Charles F. Kettering Foundation
P.O. Box 4461
Melbourne, Florida 32901

Information Explosion, The
34 Minutes long - 16 mm, color, 1969
Ohio State University, Motion Picture Division

Meanings are in People
24 Minutes long - 16 mm, color, college and adult, 1965
BNA Films

Project Discovery
28 Minutes long - 16 mm, color, 1965
Encyclopedia Britannica Educational Corporation

Resources for Learning
20 Minutes long - 16 mm, color
McGraw-Hill

Rx for Learning - Individually Prescribed Instruction
28 Minutes long, 16 mm, color, 1968
Wm. Matthews & Co.

Television Techniques for Teaching
23 Minutes long, 16 mm, color, 1968
Great Plains National ITV

Note: All films available from University of Missouri Film Library.

# APPENDIX H

## Recommended Readings For First Training Program Preparation

University of Missouri - Columbia Training Program for
Pilot State Dissemination Programs

Charles H. Koelling, Director
Carl C. Fehrle, Associate Director
October, 1970

REFERENCES RECOMMENDED FOR PRE-WORKSHOP PREPARATION:

BOOKS:

Becker, Joseph.
Information Storage and Retrieval; tools, elements, theories. N.Y.: Wiley, 1963 ($12.95)

Sherman, C. Neil.
Introduction to Educational Information Centers, L.A.: Tinnon, 1969. ($5.50, paper $3.50)

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ED 029-362
Elswick, Donald E.
Research Seminar for Training Instructional Leaders in Development and Utilizing Research. (Kentucky Dept. of Education, 1967)

ED 032-438
Farr, Richard S.
Knowledge Linkers and the Flow of Educational Information. (Stanford University, 1969)

ED 020-765
Kurland, Norman D.
A Feasibility Study to Determine Need and Function of an ERIC Document Center for State Education Department. (State University of N.Y., Albany, 1967)

ED 016-407
Nuss, Eugene M.
A Demonstration Model of a Means to Disseminate Advancements in Instructional Uses of Educational Media. (Pennsylvania State Dept. of Instruction/Lockhaven State College, 1966)

# APPENDIX I

## Curriculum For Training Program For Pilot State Dissemination Programs

First Pilot Training Program
University of Missouri-Columbia
Memorial Union
October 19-23, 1970

Dr. Charles H. Koelling, Director
Dr. Carl C. Fehrle, Associate
Director

# CURRICULUM FOR TRAINING PROGRAM

# FOR PILOT STATE DISSEMINATION PROGRAMS

## INTRODUCTION

To effectively develop a dissemination program for the state (states) requires actual knowledge of the tools for research, use of the tools, plus training in the preparation of search and secure procedures. This preliminary experience is essential to future development of statewide and regional information dissemination centers.

The ultimate concern of educators is that of encouraging continuing professional development both personally and within the school systems. Several, if not many, research projects have been completed wherein the feasibility of dissemination centers was discussed and evaluated.[1] Although the primary problem is that of coordinating available research materials, the secondary problem is that of stimulating school officials and teaching personnel to make use of available research.

Research cannot be considered in isolation, just as a department (within a school, college or state department) does not function in isolation.[2] Therefore, part of the task of the dissemination personnel is the integrating of research findings in the everyday experience of the local school personnel. A mere knowledge that research exists on a certain subject is not sufficient; nor is the acquisition of such material the answer. Effective "using" of research requires a general knowledge of "doing research".[3] Thus the dissemination staff has a further task of insuring effective use of research findings. In a study by Elswick[6], it was found that effective use of ERIC required a one-to-one or small group relationship. Studies conducted in Pennsylvania, Utah, and Illinois[4] provide further evidence for successful use of research. A later study conducted by the Kentucky Dept. of Educ. (1967)[5] illustrates that through the use of regional seminars instructional leaders can be trained in the development and utilization of research.

From these findings, the necessity of this current project is even more evident. One cannot expect to train others in the use of research materials until he knows how to use the research materials himself, and for what purposes one uses certain research tools. Use warrants aquisitions, acquisitions warrant storage and retrieval. But even so, unless the essential link is created between the state department and

the local schools, the files will go un-used. In a study by Farr[7] the ideal functioning of a linking institution would consist of:

1. Anticipate or sense an area of concern among members of its target audience

2. Turn to the resource system and gather all the available information on that subject

3. Select only the most salient elements, summarizing and drawing conclusions

4. Present this exhaustive review of the literature in an easily readable and digestible form, and

5. Disseminate the document effectively, reaching the most influential members of the audience which is in need of the information.

Such is not an impossibility with proper training of personnel in the state department of education and the readying of communication channels throughout the state.

1. Elswick, Donald E., Research Seminar for Training Instructional Leaders in Development and Utilizing Research. (Kentucky Dept. fo Educ., 1967) ED 029-362

2. Council of Chief State School Officers, State Department of Education Leadership Through Research. Washington: The Council, 1963. 31 p.

3. Griffiths, Daniel E., Research in Educational Administration, An Apprasal and a Plan. New York: Bureau of Publications, Teachers College, Columbia University, 1959. 59 p.

4. Bean, John E., Research in State Departments of Education. Research Report. Washington: Office of Education, U.S. Department of Health, Education, and Welfare, 1965. 155p.

5. Elswick, Donald E., Research Seminar for Training Instructional Leaders in Development and Utilizing Research. (Kentucky Dept. of Educ., 1967) ED 029-362

6. ibid.

7. Farr, Richard S., Knowledge Linkers and the Flow of Educational Information. (Stanford Univ., 1969) ED 032-438

APPENDIX J

Evaluation Form Designed By Advisory Committee adn Training Team
and The Results From The Fourteen Trainees

November 25, 1970

PILOT STATE DISSEMINATION PROGRAMS
PARTICIPANT REACTION TO TRAINING PROGRAM
UNIVERSITY OF MISSOURI-COLUMBIA

To: Project Directors, Retrieval Staff and Field Agents

Now that you have had the time to do some reflecting thinking about the first training program and use some of the information and knowledge gained from your experiences at University of Missouri-Columbia, we are asking you to complete this questionnaire. As you consider each question, please include the entire week's training, the discussions and training during our site visits, material provided for you to read, and any participation in the pre-planning of the first training conference. The questions do not refer to any specific presentation or acitvity but to the entire training program in general.

As you mark these questions, compare your level of competence at the time of entry into the project with your competence at this time.

The purpose of this questionnaire is to check our progress toward the established objectives and to help us gain some insights into planning the follow-up site visits and the future training program.

Your cooperation in completing this is appreciated.

Charles H. Koelling
Project Director

Carl C. Fehrle
Associate Project Director

Enclosure

Project Directors: Please return the questionnaires to Dr. Charles H. Koelling by December 15, 1970.

PILOT STATE DISSEMINATION PROGRAMS

PARTICIPANT REACTION TO TRAINING PROGRAM

UNIVERSITY OF MISSOURI-COLUMBIA

FOR ALL STAFF MEMBERS

Broad Objectives

1. One of the objectives was to provide - within the time limitation - the widest possible range of experiences within those available on topics directly or indirectly related to present and future work of the dissemination teams.
   Indicate to what extent this objective was accomplished:
   1 a little;
   9 to a fair degree;
   4 almost entirely;
   ___ completely.

2. One of the objectives was to provide information and training (both in the sessions and in the written materials) so that each training member could describe the essential elements in the change process.
   Indicate to what extent you can describe the elements in the change process to someone who is not familiar with it:
   ___ not at all;
   12 fairly well;
   2 very well;
   ___ completely.

3. One of the objectives was to prepare you to describe what the project is to do in your state.
   Indicate what contribution, if any, you think the training program has made to date toward assisting you in doing this:
   ___ none;
   4 some;
   5 quite a bit;
   5 a great deal.

4. One of the objectives was to aid you in describing the steps in problem solving.
   Indicate to what extent the training program has assisted you to date in obtaining understanding and practicing of problem solving as it relates to the activities of your project:
   ___ none;
   7 some;
   7 quite a bit;
   ___ a great deal.

5. One of the objectives was to improve your ability to communicate. Indicate to what extent the training program has helped you communicate orally and in written form with your clientele and with your colleagues in this project:
____ none;
7 some;
6 quite a bit;
1 a great deal.

6. One of the objectives was to assist you in developing rapport with individuals and to engage effectively in group processes. Indicate to what extent the training program assisted you in "breaking barriers" and "interacting with people":
1 none;
8 some;
4 quite a bit;
1 a great deal.

7. One of the objectives was to assist you in identifying obstructions and deterents to the execution of your program. Indicate to what extent the training program alerted you to anticipate problems in your program:
____ none;
7 some;
4 quite a bit;
3 a great deal.

8. One of the objectives was to develop teamwork within your group. Indicate to what extent the training program assisted you in organizing a plan to permit better teamwork within your group:
1 none;
5 some;
3 quite a bit;
5 a great deal.

9. One of the objectives was to develop realistic expectations in your work. Indicate to what extent the training program assisted you in establishing (forming) your own realistic and obtainable goals:
1 none;
7 some;
4 quite a bit;
1 a great deal.

10. The purpose of the scheduled State Meetings at the close of each day during the training session was to permit the trainees in each state to transfer the knowledge gained to others in their team and to clear any conflicting ideas among role responsibilities. If the meetings would have been held as scheduled, the State Meetings at the end of the day would have been:
____ no help;
4 some help;
5 quite a bit of help;
4 a great deal of help.

11. The tour of the computer center at Jefferson City and the information received there were:

____ no help;
2 some help;
2 quite a bit of help;
10 a great deal of help.

12. The opportunity to have a member of our team interview an administrator, to designate descriptors, submit the question to Glenn White, investigate other resources to answer the question, prepare the material for the administrator and conduct the conference with the administrator was:

____ no help;
2 some help;
4 quite a bit of help;
7 a great deal of help.

13. Given the time limitations of the first training session and your present knowledge of the three state programs, what would you have left out and what would you have put in its place
(a) for the benefit of the group?

(b) for the benefit of yourself in your state role?

QUESTIONS FOR FIELD AGENTS

To what extent has the training program (considering different phases of it) assisted you in being able to:

| | Does Not Apply | None | Some | Much | Very Much |
|---|---|---|---|---|---|
| 1. understand the ERIC system? | | | 1 | 4 | 1 |
| 2. identify sources of information other than ERIC? | | | 4 | 1 | 1 |
| 3. understand the process for identifying and utilizing consultant experitse? | | 1 | 3 | 1 | 1 |
| 4. recognize that additional consultant expertise is available outside the State Department? | | 1 | 2 | 3 | |
| 5. conduct an interview effectively? | | | 6 | | |
| 6. develop rapport with individuals and groups? | | | 3 | 3 | |
| 7. analyze problem situations, discover alternative solutions, and point to possible directions? | | 1 | 3 | 2 | |
| 8. function as a catalyst? (change agent) | | | 4 | 2 | |
| 9. demonstrate a working knowledge of newer developments in education? | | 2 | 2 | 1 | |
| 10. analyze a school community? | | 1 | 4 | | |

FIELD AGENTS:
Please return this questionnaire to your Project Director.
PROJECT DIRECTOR:
Please return the questionnaires to Dr. Charles H. Koelling by December 15.

QUESTIONS FOR PROJECT DIRECTORS

To what extent has the training program (considering different phases of it) assisted you in being able to:

| | Does not apply | None | Some | Much | Very Much |
|---|---|---|---|---|---|
| 1. understand the ERIC system? | | 2 | 1 | 1 | |
| 2. identify sources of information other than ERIC? | | | 4 | | |
| 3. understand process for identifying and utilizing consultant expertise? | | 1 | 2 | 1 | |
| 4. recognize that additional consultant expertise is obtainable outside your own State Department? | | 2 | 1 | 1 | |
| 5. develop means (guidelines) for using consultants? | | 3 | 1 | | |
| 6. recognize and diagnose problems in the dissemination process? | | | 3 | 1 | |
| 7. develop a monitoring system for the program? | | | 3 | 1 | |
| 8. develop a scheme of evaluation for your own project? | | 1 | 2 | 1 | |

PROJECT DIRECTOR:
Please return this questionnaire to Dr. Charles H. Koelling by December 15, 1970.

QUESTIONS FOR RETRIEVAL STAFF

To what extent has the training program (considering different phases of it) assisted you in being able to:

| | Does not apply | None | Some | Much | Very Much |
|---|---|---|---|---|---|
| 1. better understand the ERIC system? | | | 1 | 1 | 2 |
| 2. identify sources of information other than ERIC? | | | 2 | 1 | 1 |
| 3. understand the process for identifying and utilizing consultant expertise? | | | 1 | 2 | 1 |
| 4. organize a system to obtain consultant expertise outside your State Department? | | | 1 | 1 | 2 |
| 5. describe in detail the components, structure, and function of the data systems? | | | 2 | 1 | 1 |
| 6. search the data systems which are available to you for use in your project for information on specific problems? | | | 2 | 2 | |
| 7. prepare reports on specific problems or questions utilizing the data systems? | | 1 | 2 | 1 | |
| 8. identify, develop and correlate with existing data systems, a system for accumulating, providing access to, and disseminating information relating to projects and programs within the state which are not included in the information in current data systems? | | 1 | 2 | 1 | |

Continued

QUESTIONS FOR RETREIVAL STAFF (Continued)

| | Does not apply | None | Some | Much | Very Much |
|---|---|---|---|---|---|
| 9. effectively catalog and cross reference materials of all kinds into the data systems? | | | 2 | | 2 |
| 10. construct simplified, topical and subject oriented reference catalogs for use by the field agents? | | 1 | 2 | 1 | |
| 11. use effectively the services of secretaries and other sub-professionals in the search and dissemination process? | | | 2 | 1 | |
| 12. identify and develop means for using consultants which include identifying expertise and competence of consultants and also the means for injecting these data into the system for appropriate use? | | | 3 | 1 | |

RETRIEVAL STAFF:
Please return this questionnaire to your Project Director.

PROJECT DIRECTORS:
Please return the questionnaires to Dr. Charles H. Koelling by December 15, 1970.

# APPENDIX K

## Comments From The First Training Program Trainees

COMMENTS OF FIRST TRAINING PROGRAM

1. One of the objectives was to provide - within the time limitation - the widest possible range of experiences within those available on topics directly or indirectly related to present and future work of the dissemination teams:

   Staff Member #15 - But was the accomplishment of this objective relevant to the needs of the participants.

2. One of the objectives was to provide information and training (both in the sessions and in the written materials) so that each training member could describe the essential elements in the change process.
   Indicate to what extent you can describe the elements in the change process to someone who is not familiar with it:

   Staff Member #3 - Written material most valuable.

   Staff Member #15 - But not because of the training session necessarily. Our state is testing the Havelock model. I think the training sessions did not specifically help the training members to describe those particular steps.

3. One of the objectives was to prepare you to describe what the project is to do in your state.
   Indicate what contribution, if any, you think the training program has made to date toward assisting you in doing this:

   Staff Member #3 - My enthusiasm was lifted.

   Staff Member #15 - It has helped retrieval persons greatly, but I feel that it has not specifically aided our field agents to understand the model we are testing.

4. One of the objectives was to aid you in describing the steps in problem solving.
   Indicate to what extent the training program has assisted you to date in obtaining understanding and practicing of problem solving as it relates to the activities of your project:

   Staff Member #3 - Have had other problem solving work shops which prepared me to a greater extent.

   Staff Member #15 - Once again Bill Hoff and Larry Hale were great. I only wish they had been familiar with the steps in Havelock outlines.

5. One of the objectives was to improve your ability to communicate. Indicate to what extent the training program has helped you communicate orally and in written form with your clientele and with your colleagues in this project:

Staff Member #3 - Not much help here, as this is one of my strong areas. Have had much experience in other jobs.

Staff Member #15 - Communication implies a two way exchange of ideas. Both parties must be helped.

6. One of the objectives was to assist you in developing rapport with individuals and to engage effectively in group processes. Indicate to what extent the training program assisted you in "breaking barriers" and "interacting with people":

Staff Member #3 - Had this before training, but training renewed positive points.

Staff Member #15 - Most of the training in group process was academic rather than involvement. Bodenhamer & Dobbs made excellent presentations; Dobbs gave us some practice, Bodenhamer practically none.

7. One of the objectives was to assist you identifying obstructions and deterents to the execution of your program. Indicate to what extent the training program alerted you to anticipate problems in your program:

Staff Member #3 - Bill Hoff helped here.

Staff Member #15 - Hard to tell.

8. One of the objectives was to develop teamwork within your group. Indicate to what extent the training program assisted you in organizing a plan to permit better teamwork within your group:

Staff Member #3 - Work of Bill Hoff was very valuable in this area.

Staff Member #15 - It helped us understand each other better and therefore did develop better teamwork--but it did not help us develop a plan to permit better teamwork.

9. One of the objectives was to develop realistic expectations in your work. Indicate to what extent the training program assisted you in establishing (forming) your own realistic and obtainable goals:

Staff Member #3 - Not much help here.

10. The purpose of the scheduled State Meetings at the close of each day during the training session was to permit the trainees in each state to transfer knowledge gained to others in their team and to clear any conflicting ideas among role responsibilities. If the meetings would have been held as scheduled, the State Meetings at the end of the day would have been:

Staff Member #3 - This communication took place in motel, car, over meals, etc.

Staff Member #8 - Because the 4 o'clock meetings were not utilized for this purpose, we found ourselves meeting on our own time to do this.

Staff Member #10 - State meetings at sometime other than the end of the day might have been of great value.

Staff Member #15 - It was difficult to relate training to role responsibility where the trainees did not, as yet, understand role responsibility.

11. The tour of the computer center at Jefferson City and the information received there were:

Staff Member #3 - Very impressed with these, but time was wrong and much too short. We needed more time to pick Glenn White's brain.

12. The opportunity to have a member of our team interview an administrator, to designate descriptors, submit the question to Glenn White, investigate other resources to answer the question, prepare the material for the administrator and conduct the conference with the administrator was:

Staff Member #3 - More time in this sort of activity is a must. Much more valuable than lectures.

Staff Member #8 - The experience seemed most helpful for the field agent.

13. Given the time limitations of the first training session and your present knowledge of the three state programs, what would you have left out and what would you have put in its place.

(a) for the benefit of the group?
(b) for the benefit of yourself in your state role?

Staff Member #1 - I think the training program was excellent except thought it was too strictly structured prior to knowing who the trainees were, their backgrounds, and needs. Elasticity and selectivity should be emphasized so that program can be "tailored" to needs of trainee-partly as he perceives them. No part was irrelevant-indeed all parts should be kept with added elections juxtaposed in schedule for trainee selectivity. The human factor-the "personal" touch was missing. Felt you were entirely too concerned with 8 hours of "hard" work to the determining of the involvement of human interactions. Interspersed with your "formal"

course work should of been a great deal more time for interaction between, among agents, specialists, and directors. Need the feeling you were afraid to leave "gaps" in your scheduling lest some observors might think you hadn't prepared the course very well.

Staff Member #2 - Needed more time in the Library research on prolem solving. I felt the sessions with Glenn White were too short.

Staff Member #3 - More activity-group work, less lecture. The group needs to interact. Lecture method does not encourage this. By next session we will be more aware of problems, so problem solving consultants will be very valuable. A panel including people from computer retrieval field and school fielding questions might be great.
Need to work more with computer language expecially developing descriptors. A week's work with Glenn White would be best for me. Boulder has their own systems. Boulder differs.

Staff Member #4 -
Ed Technology presentation-Replace with discussion
Public Relations- Replace with discussion
Motivating People-Replace with discussion
Generally, some of the lecture sessions could have been condensed with more time for discussion, where the resource person was on the same "level" as the participants.

Staff Member #6 - Add more group participation and group interaction. Submit to group clearly defined objectives of the program rather than vague, general goals. Submit a statement of purpose and procedure from each group represented: the three states, the USOE, the evaluation committee, and the Missouri educators.
Remove from the program lectures aimed at theoretical situations rather than actual, realistic and practical situations. Contact with people in similar roles to share practical experiences.

Staff Member #7 - First training session would have been more meaningful if sufficient time was given to understanding of the three state programs, and the functional roles of field agents.

Proposed guidelines should have been designed for evaluating specific information pertinent to each state and general information pertinent to improving the quality of education at the state and local levels through the utilization of Research Information.

Afternoon session for individual state meetings should be eliminated. State meetings should be combined to provide for interaction and sharing of information as related to each state participation in the dissemination of information.

Staff Member #8 - Time to hear from each state regarding their gains and the directives to reach these goals. Time for participants to exchange ideas regarding their role responsibilities. Sessions devoted to discussion and led by consultants in addition to lecture.

Specific time to exchange ideas with project directors designed into the program. Thanks to your efforts we were able to meet several times in this regard. Major program was designed especially for retrieval staff and field agents. Suggest special sessions could have been planned for project directors related to the general topic of information dissemination and successful information center operation.

Staff Member #9 - The program would have been more helpful if the conflict in evaluation procedures had been avoided. Less emphasis on change agents and more emphasis on change processes. More freedom for each state to pursue its own goals.
More emphasis on information dissemination and communication techniques.

Staff Member #10 - Many of the lectures (with the exception of several given by Mr. Hoff) and had more time for communication between the states on the directions of their programs and for interaction among team members of each state individually.
More time for interactive sessions with field agents as to question negotiation, material supplied, etc.

Staff Member #11 - I would have left out Dr. Hobb's presentation and had more time in the area of participatory learning.

Staff Member #12 - (a) Left out field agents meeting with Scott-Forseman and Silver Burdett representatives Dr. Hobbs-Sociologist on Sociological change
(b) A general briefing on materials and programs in education identifying problems of a particular local. Communicating others needs in written form. This was touched on somewhat (Hatesohl)
Better understanding of questioning techniques.

Staff Member #13 - My previous responses and recommendations for the training program express my feelings on this.

Staff Member #14 - (a) creating and accepting change. needed something to socialize or get to know people earlier by jobs. (b) creating and accepting - a bit too esoteric change. Future in Ed. Technology-mainly because I was fairly familiar after being in school a year with ideas and materials. Felt the material for retrieval staff specifically excellent and participation training was well done and worthwhile but would have like to have Utah group have more discussion of Havelock's material and more time on retrieval of information etc. instead of some lectures.

Staff Member #15 - (a) I would have left out almost all of the presentations and put in their place: (1) Sessions in an understanding of the total NCEI program and the place of this project in that grand scheme. (b) Involvement sessions where in each state attempted to develop rationale for its part in the total NCEI program. (c) Developments of a plan and timetable for the products of each state, when the knowledge and/or procedure would be available to other

states and how it would be used. (d) Buzz sessions or Brainstorming sessions to develop the total training package rather than being asked to react to a developed package.

(b) A. Training in management techniques.
B. Training in the Havelock Model
C. Meeting with NCEI staff
D. More time with other state directors
E. Training specifically in needs assessment.

# APPENDIX L

The Programs For The Second Training Programs

Oregon, South Carolina, Utah

OREGON PROJECT
Second Training Program
Portland, Oregon
February 11-12, 1971

## SECOND TRAINING SESSION - PORTLAND, OREGON

### Thursday, February 11, 1971

9:30 Carl C. Fehrle - Welcome and Overview

9:45 Charles H. Koelling - Review of goals of U.S.O.E. How the Oregon Board of Education goals compliment the goals of U.S.O.E. (Much interaction and participation).

10:45 George Katagiri - Review of the goals of the Oregon Dissemination Project and how they compliment the goals of the U.S.O.E. and the Board of Education.

1:00-3:00 Robert Fussell and Steve Stivers - Case studies. Review of actual cases. These were given in detail and the discussion involved the retrieval staff, project director and the people from University of Missouri - the role of all. The major part of the discussion centered around the field agents' role.

3:00 Randel K. Price - Role of the field agent summarized.

### Friday, February 12

9:00 Glenn White - the role of the retrieval staff.

10:00-11:00 Section A: Retrieval staff continued work on coding with Glenn White.
Section B: Field agents - Charles Koelling led the question and answer period.
Discussed: Summer work. Keeping informed.

11:30 Bill Hoff - Management.

1:00-2:15 Bill Hoff - Management (much group participation)

2:30 Bill Hoff - Problem solving. (group interaction)

2:40 George Katagiri - Remarks. Objectives for the future work.

2:45 Randel Price and Charles Koelling - Things to remember as you progeess.

3:00 Dismissed.

Much praise is given to the Oregon participants for their eagerness to actually become involved and participate in the discussion. There seemed to be no hesitancy to ask questions to assist them in solving their own problems.

Equal praise is given to the prepared group from University of Missouri-Columbia who was able to function in this "dialogue" and present the necessary attitudes, skills, and knowledge. It was most valuable to have Ruth Love serve as observer and appraise the trainers from Missouri University-Columbia.

SOUTH CAROLINA

Second Follow-up Site Visit, March 28-31, 1971

Second Training Program, April 1-2, 1971

I. I. Project Personnel From South Carolina:

Dr. Ed Ellis - Project Director
Dr. Diana J. Ashworth - Chief Supervisor
Miss Eilene Folger - Information Analyst
Miss Sharon Gibson - Chief Secretary
Other RIU Personnel
Miss Tamara Crolley - Communication Specialist
Mr. Alfonso Evans - Communication Specialist
Miss Ellen Tollison - Information Analyst

II. Training Staff from University of Missouri-Columbia (UMC):

Dr. Charles H. Koelling - Director, Pilot Training Program; Director Continuing Professional Education; Professor of Education.

Dr. Randel K. Price - Member of the Advisory Committee of the Pilot Training Program; Professor of Extension Education; Department Chairman and Director, Training and Staff Development in Extension.

Dr. Paul T. King - Consultant of the Pilot Training Program; Director of Testing and Counseling Services; Professor of Education.

Mr. William W. Hoff - Member of the Advisory Committee of the Pilot Training Program; Coordinator Industrial Reference Center, Extension Division.

Dr. Carl C. Fehrle - Associate Director of the Pilot Training Program; Associate Professor of Education.

III. Tentative Training Program - April 1-2, 1971:

Columbia, South Carolina; Sheraton Columbia Inn, 630 Assembly Street; Phone: 803 779-4900

Thursday, April 1, 1971

9:00 - 9:15 Overview of Training Program - Carl Fehrle

9:15 - 11:45 Sensitivity Training and Group Processes Emphasizing Participation - Inner Circle Approach with input from outside then person giving input leaving the group to deal with the input among themselves - Paul King

11:45 - 1:00 Lunch

1:00 - 3:00 1. Steps involved in problem solving.

2. Role of communication specialist.

3. Methods of recognizing and diagnosing problems in the dissemination and change process.

4. Analysis of the present data package (retrieved material sent to the requester).

3:00 - 4:00 The South Carolina Project In Perspective - Ed Ellis

4:00 - Adjournment

Friday, April 2, 1971

9:00 - 9:30 Utilizing the advisory committees in the target areas - Randel K. Price

9:30 - 10:00 1. Effective ways of locating good educational consultants out of state.

2. Catalog and cross reference material of all kinds into the data system.

3. Construction of simplified, topical and subject oriented reference catalogs for use by the commucation specialists.

4. Bookkeeping system--accounts receivable/payable.

5. Assistance in the identification, development and correlation with existing data systems, a system for accumulating and disseminating information relating to projects and programs within the state which are not included in the current data system.

William Hoff

11:00 - 11:45 Questions - Answers

Case study (review a case for the group - all participants interact) - Al Evans.

11:45 - 1:00 Lunch

1:00 - 2:00 Case study (all participants interact) - Tammy Crolley.

2:00 - 3:00

1. Analysis of the monitoring system in the Project to determine strengths and areas for change.

2. Development of an evaluation system for Project activity and product.

3. Awareness of better ways of doing things as determined by other dissemination systems.

4. Methods to increase working knowledge of newer developments in education.

5. Informal evaluation of the "effect" of the Project in the districts.

6. Use of the state specialist.

This will be done by group discussion - under the direction of Carl C. Fehrle

3:00 - Adjourn

SECOND TRAINING PROGRAM FOR UTAH

March 3-4, 1971

Salt Lake City, Utah

I hear - I forget

I see - I remember

I do - I understand

Chinese Proverb

University of Missouri-Columbia
Pilot Training Program
Dr. Charles H. Koelling, Project Director
Dr. Carl C. Fehrle, Associate Project Director
Dr. Larry A. Hale & Mr. William W. Hoff
Consultants

Second Revision of Plans
Revised when meeting with
Bill Hoff and Larry Hale

Second Training Program for Utah
March 3-4, 1971
Travelodge Motel, Salt Lake City, Utah

Wednesday, March 3, 1971

8:45 - 9:00 Overview of the Training Program - Carl C. Fehrle

9:00 - 11:30 Directed by Kenneth Lindsay
Supported by Larry Hale
Bill Hoff
Carl Fehrle

9:00 - 10:00
Topic 1: Policy and procedure of using technical assistants and other human resources in the Utah Dissemination Project.

Objective 1 - Each resource agent will write the procedure to be used in obtaining a technical assistant and/or other human resources and outline three methods of follow-up.

Objective 2 - The project director, with the assistance of the resource agents and the retrieval manager, will put into writing the procedure for follow-up after a technical assistant and/or other human resource have been used.

Procedure: The present plan of requesting the services of the technical assistant will be distributed to the group by the project director.

After discussion and interaction, the project director and his staff will put into writing a procedure to use for follow-up.

Consultants: Larry Hale
Bill Hoff
Carl Fehrle

10:00 - 11:30
Topic 2: Learning to know the responsibilities and talents of 15 of the state technical assistants.

Objective 3 - Each resource agent and retrieval manager will identify 8 state technical assistants and be able to list two of his responsibilities.

Procedure: Ken Lindsay, the project director, will contact 15 technical assistants and ask them to give a 5 - 8 minute presentation about themselves and their work.

The test of the objective will come later in the training program when the resource agent and retrieval manager discuss cases.

The resource agents and retrieval manager will become better acquainted with these 15 technical assistants during lunch. Care must be taken that the seating arrangement provide for this.

11:45 - 12:45 Lunch
(Each will pay for his own lunch and then complete an expense voucher for reimbursement from University of Missouri-Columbia)

1:00 - 4:30 Afternoon Session

1:00 - 2:00
Topic 3: State technical assistants learning the work of the field agents and the retrieval manager.

Objective 4 - The state technical assistants will be able to identify the three resource agents and the retrieval manager and state two ways they can be of service to the project.

Procedure: The project director will contact each of the three field agents and the retrieval manager and have them give a 5 - 10 minute review of their accomplishments when using the technical assistants.

The field agents will give the names of the state technical assistants they have used in their work.

2:10 - 3:00
Topic 4: Review of the work of the project by administrators who have been served.

Objective 5 - The state technical assistants and resource agents will be able to list four ways of successfully getting the schools to identify and solve their problems including the services of the retrieval center in this process.

Procedure: The project director will contact two or three superintendents. One superintendent who has used the services of the project will be contacted in Jerry's area and one in Norm's area.

These administrators will state how their problems were identified and how information was returned to them in written form and the way human resources were used.

Discussion and input from Larry Hale
Bill Hoff
Carl Fehrle

3:00 - 4:30 Work session using the objectives of the day (Ken Lindsay, Bill Hoff, Larry Hale and Carl Fehrle move from group to group.)

Group 1 Jerry Hawley
Ruth Nielson
Secretary in the Regional Center
State technical assistants

Group 2 Norm Kohler
Bob Hanson
Secretary in the Regional Center
Kathy Wallentine

Procedure: Each of the above groups will submit plans of ways to return the print-out and inform the requester of information.

After the groups have met for 30 minutes and written their plans, Jerry and Norm will orally present these plans.

Bill Hoff and Larry Hale will react on these plans. A written evaluation will be given to each group.

6:30 Dinner at the Travelodge Motel

Master of Ceremonies - Larry Hale
Welcome - Carl Fehrle (Goals of the U.S.O.E. will be emphasized)
Response - Ken Lindsay (for the project)
(for the State Department)

<u>Thursday, March 4, 1971</u>

8:30 - 11:30 The training will be given to two separate groups.

Group 1 Secretaries from the Regional Center
Kathy Wallentine
Bill Hoff

Objective 6 - The secretaries in the Regional Centers will do the preliminary search for the requester and demonstrate in writing how they keep records of these requests.

Procedure: Bill Hoff and Kathy Wallentine will review the training given to the regional secretaries on the site visit January 25-27.

Additional and advance training will be given.

Materials: Kathy Wallentine will supply the secretaries with books to do the preliminary searches.

Trainers: Bill Hoff
Kathy Wallentine

Group 2 Ken Lindsay, Project Director
Norm Kohler
Jerry Hawley
Ruth Nielson
Bob Hanson
Resource Agents

Objective 7 - The resource agents will list three methods of returning the print-outs to the requester and four possible ways of follow-up.

Procedure: Larry Hale will discuss the "second step" for the resource agents.

Materials: Kathy Wallentine will furnish Larry Hale the following:
a) Three or four print-outs from Boulder
b) Three or four letters that came to Kathy from the resource agents
c) Three or four responses written by Kathy
d) Four completed cases.

11:45 - 12:45 Lunch

1:00 - 2:00
Topic 5: Havelock's model - by Larry Hale.

Objective 8 - The resource agents, retrieval manager, and project director will list four similarities of the Havelock's model with the training program of the University of Missouri-Columbia.

Procedure: Lecture
Discussion
Interaction

Materials: The project director will furnish an overhead projector

2:10 - 3:00
Topic 6: Systems Management - by Bill Hoff

Objective 9 - Even though an excellent model is designed, all members must be cognizant of good communications. A list of recommendations to improve communications for the project will be formulated.

Procedure: Lecture
Discussion
Produce list for better communication for implementation

3:05 - 3:10 Reaction - by Ken Lindsay

3:10 Dismissal

# APPENDIX M

Comments From The Trainees Pertaining to Second Training Program

EVALUATION OF THE SECOND TRAINING PROGRAM - MARCH 3-4, 1971

TRAVELODGE, AT 6th SOUTH, SALT LAKE CITY, UTAH

1. Do you view the individualization of the second training program at Salt Lake City, Utah, as having been more valuable than the group training of the personnel from all three states in Columbia, Missouri, during October of 1970?

Staff Member #1

Yes

Staff Member #2

In some ways yes, in some no. We did get into more specifics as to our problems and how we are operating. It may be of value to see how the other two states are operating even though we are not doing the same thing. I believe that we could learn from each other. This session was good but I don't think we would want to meet by ourselves every time.

Staff Member #4

Yes
I see this type training program as being more relevant to our immediate needs, as the information pertained directly to our state operation. Involvement of secretarial help was a great and beneficial idea. More personal involvement was obtained as we were involved more directly with our local people.

Staff Member #5

The individualizing of the second training session was of great value but not of as great a value to me as the individualization of the retrieval staff in Missouri. The sessions put on in Missouri for the retrieval people were extremely valuable. Also the associations that could be followed up, when help was needed, have been very valuable.

I am for individualizing the sessions.

2. In the form of general statements, list what you learned from the informal conversations and instruction in the two day training sessions and site visits:

Example: A better idea of my role
Different times of contacting a state specialist

Staff Member #1

No answer

Staff Member #2

I got a lot of help from the site visits because they were here in the actual operation. Larry pointed out the advantages of getting people involved early in the problem identification process. I have seen the merit of this already. Bill gave my office staff some very helpful ideas in keeping records on the activities. In general, we all talk a little better program than we ran. The on site visits get down to what is really taking place.

Staff Member #3

I. A better idea of my role: Secretaries' and Clients' roles.
II. Different times of contacting a state specialist.
III. The need of communication and information from all resources--New products--CAT, PET, CAP, and SID.
IV. How to make use of the secretary to do hand searches.
V. How the superintendent could better utilize the resource agent and research processes for finding various solutions.
    A. Motivation--Vary the materials so that the requester might see with a "tomorrow mind".
    B. Follow-up activity--
    C. Get material back from Boulder in a different way.
    D. Record keeping
    E. The threat of people having to admit to having a problem--(start "where they are at")
        1. Need to vary the process.
        2. Procedure for setting up teams

Staff Member #4

The meeting with State Agency Specialists was very helpful and may have opened the way for better communications between State Specialists and Resource Agents.
Better bookkeeping and secretarial methods. Ideas such as letters of commitment, etc. were of great importance.
Although I have not received Dr. Larry Hale's commentary on the written resource problem. I am looking forward to it with great expectations. An increase of need for establishment of Technical Assistance Teams was manifested.
One idea of great value was the idea of referring to a problem as a "need" and not a problem. Thereby limiting the development of a "problem psychosis".
Involve Technical Assistance at ground floor or early in the process.

Staff Member #5

Face to face discussion still needs something to come to meaningful conclusions or results.
We have a long way to go.
There is a need for feedback, more so than is evident on each step.

3. As a result of the formal and informal training, are you better prepared to perform the responsibilities of your role?

Staff Member #1

Yes

Staff Member #2

Yes
Why or Why not? I have become more aware that my role is one that may not be very visable to many of the people I work with. If it changes them or the function of their job it quite often comes about in such a way that they do not really know what caused the change. I was given information on how to motivate people to action and how to get them involved.

Staff Member #3

I appreciated the personal confidences expressed in me.
My approach might be somewhat different from other agents, but my thinking became more organized. I became somewhat oriented into the meanings of innovative words or terms.

Staff Member #4

The opportunity to "put into writing" one of the problems we were dealing with also helped me to realize the many different influences or pressures focusing on an individual problem. My awareness will be more oriented towards watching for these pressures as they arise.

Staff Member #5

The training made me more aware of the needs of the agents and the specialists as well as far as information retrieval is concerned. It made me feel the thrust sometime in the future would be more personalized service to the agency personnel. Not just the ERIC service, but program information from different areas.
Plans should be made to share the original request and also the retrieved information for the specialists.

4. The afternoon of March 3 "we" role played the process. Was this of value to you?

Staff Member #1

Yes

Staff Member #2

Yes
I felt that it was of great value to one of the superintendents in my area, he has a much better understanding of the program in relation to the state school office staff of specialists. As for me, personally, I had a chance to get other agents and state office personnel feed back on how the process of contacting, fielding, and referring a request was or could be handled.

Staff Member #3

Yes
That problems are not unique to one area
That some procedures or systems are somewhat routine--do we need to move up?
That there is still much room for improving the client's understanding and relationship to the technical assistant--RE: Administration of the coordinating Function.
That frustrations are common to the T.A. and the client due to the long wait because of the inability to facilitate materials.
I would like to have seen this process performed by a highly trained agent, and expanded to include the principal, the teacher, and the student as the client. This might have helped to identify for all Technical and Research Agents and clients the area or areas where change is the most difficult to achieve. The T.A. field agent and the client, i.e. Superintendents, Principals, etc., might come to some understandings as to the when and where the need situation should be clarified, and then through what proper channels these needs should go. Ex: Do I always have to start with the Superintendent's and Principal's permission?

Staff Member #4

Yes
Because of a realization that approaches in problem or need situations between Resource Agents and State Specialists, are similar but may vary with the type problem.

Staff Member #5

Yes
It was wonderful to empathize with the resource agent,

and to be glad I was in the position I am. It is very important to have the agents know that they are in a "helping"role and one that is based on need rather than feeling that they are "pushing back to the problem."

5. On Thursday morning, March 4, you were divided into two groups.
   Group I: Retrieval Manager and Regional Secretaries
   Kathy worked with the regional secretaries under the direction of Bill Hoff.
   Group II: The resource agents wrote and discussed a situation under the direction of Larry Hale.

   Was this of value to you?

   Staff Member #1

   Yes (some)
   I wasn't there very much, another secretary and I sneaked back to the office.

   Staff Member #2

   Group 2. Just putting a case down on paper and looking at it had value to me. I have not yet received it back from Larry, but knowing Larry, I feel sure that I will get some good ideas from him about this case that will relate to many others.

Staff Member #3

Yes
I had not had the opportunity to initiate a change and see it through to a solution or an evaluation. I felt that I knew how teachers would react, but how the tech agent felt toward teachers' roles, and superintendents' roles in the change process was interesting. I became excited about having an opportunity to create good change, but concerned about how to handle the human and personal disciplines necessary to effect a change.

Staff Member #4

Yes
The interchange of ideas between Bill, Jerry, the evaluators, Ruth and myself was of great value in that it reinforced old ideas or methods being used and suggested new ideas and methods for different approaches in our problem seeking. Also the interchange was of aid in showing problem similarities within the state.
Susgestions for exchange of information, concerning questions asked the Resource Agents may be of great aid.

Staff Member #5

I still feel that there needs to be personal follow up even after going over this material for the second time. I still feel the stumbling block, even if they understand how to do it, is that the secretaries do not feel that they have the time to do this ... With the new Boulder products, we do not have to go into this in as much depth as anticipated, and also if we have Boulder the next year, but some of this searching and descriptorizing still needs to be done.

6. List the topics which were discussed which had relevance to your concern. (Include those discussed informally.)

Staff Member #1

No answer

Staff Member #2

No answer

Staff Member #3

1. The problem approach (the block or restraint that keeps people from getting to where they want to be)
2. How to get to the superintendent
3. Dissemination of material
4. Retrieval process
5. How much technical knowledge a T.A. must have
6. Lack of teacher communication with teachers in the same subject areas.

Thought: Why is most of the change coming mainly in the elementary school? If change ends in elementary schools, is it of any value? What can I do? Are skill concepts easier to define on an elementary level? After the "input" on a secondary level will it effect the evaluation of the "output"?

Staff Member #4

Secretarial methods of record keeping
An understanding of the background material given to superintendents in both days of session
Resource Agents role playing situation
Communications with State Specialists
Removal of some of irrelevant materials from oversized ERIC Profiles
Obtaining background information on State Specialists

Staff Member #5

Having meetings with the agents and the secretaries -

still feel this is very important. Still rather vague on the use of the specialists. Developing expectations in clients. Overview of how a project should be carried on the components etc.

7. List additional areas or question you would like to have discussed. (What do you see as implications for training in the third training session?)

Staff Member #1

A do it yourself kit.

Staff Member #2

I would like to work on the relationships of people. How better to understand them, work with them, and motivate them. In this job we can't do it alone, we must get others to do the work, identify the problems, and implement the solutions.

Staff Member #3

1. How to use the tape and at what times are contacts important for the evaluating process?
2. I have commented on the follow-up which is my concern in the above statements or questions.

Staff Member #4

a. Ways in which teachers and administrators might be stimulated to investigate
b. Methods to encourage follow-up
c. Explanatory of the Resource Agent's role in putting new ideas into practical application in the classroom.
    1. What should be his involvement, directly with the teacher
d. Getting clients to act seriously about problem once information is delivered
e. The position a Resource Agent should take on presenting a teacher's suggestions to the superintendent or district.
f. A need for help was mentioned in evaluation of alternatives and suggested a 1-2-3 step in listing potential alternatives in order of preference. And what goes into determining which alternative has priority.

Staff Member #5

More emphasis needs to be put on the understanding of research, how it can be used, the development of alternatives and their presentation, and the correlation of the whole project into the classroom. I do not at this point know what techniques or what training is necessary to affect this.

8. What areas were covered in the site visit and/or training program that might have stimulated you into deeper research (investigation) on your own? Include those you plan to research or solve.

Staff Member #1

No answer

Staff Member #2

No answer

Staff Member #3

We just received our R.I.E. from ERIC. We are researching and listing book bibliographies, pilot projects, etc., with brief commentaries.

Staff Members #4

One area of immediate concern was how to obtain evaluation on what you are doing with each profile, or question asked. Suggestions were made by Dr. Larry Hale and Dr. Bill Hoff. These I have considered and with serious thought have determined to send each client a letter.
The letter sent should indicate follow-up conducted, ideas changed, and additional action to be taken.
These letters may also be used for Supt. evaluation purposes.
A copy of the letter is included.

Staff Member #5

Closer work with specialist so they do not "fear" information going to districts. They should be aware of the new materials and I can provide these through the services this center offers.
Hopefully, finding ways to make alternatives more relevant.
To assist requesters in interpreting the materials they receive, what they can expect and how to apply it to their situation.
Got the feeling the material is not being interpreted to the requesters in a meaningful way, and also when the documents are available this will probable be much alleviated.
Still need a channel or some means of obtaining information on instructional materials in a better prepared package from the specialists.
Better ways of relating the agents to the specialists- one idea is a brief biography in the newsletter about the specialists.

9. What contribution did this training program make toward assisting you in understanding the components of the entire Utah project and the responsibilities of your role in accomplishing the goals of the state project?

Staff Member #1

No answer

Staff Member #2

I did come out of the training session much more knowledgeable about just how the other agents were operating. I was not sure just how the state school office staff fit into the program before the session, but I do now. I can better accomplish the goal of utilizing the state office people because of the understanding I gained at the session.

Staff Member #3

It defined some of the roles, and helped to give me an understanding of the need to take care in overcommitting. We identified some goals.

Staff Member #4

I felt this session established a basis upon which colaboration with State Specialists was made more possible. The session definitely opened the eyes of State Specialists as to the possibilities of the Resource Agent. This was one phase of the project where I felt relationships must be aided.
I felt a greater emphasis being placed upon the Resource Agent for establishment and requesting Technical Assistance Teams.

Staff Member #5

I feel I would like to get out and talk to the requesters once in awhile to see what we might be developing for their future informational needs. We need to make an attempt to make the need for information and research a constant thing, not just a one stop deal.
Need means for evaluating the information sought and any changes that will come ...a need to connect the information with any teams that go out ...follow-up of information needs of the team as they work with the individual educator. Would like to plan broadly so we don't react at each step ... have more of a systems approach with specific objectives for each person and perhaps written behaviorally as to what exactly we will do ...

10. Comments ... Complaints ... Compliments:

Staff Member #1

No answer

Staff Member #2

No answer

Staff Member #3

Thank you very much for the help I received. I appreciated the contributions of our Utah people. I enjoyed the friendly and complimentary attitude of Larry Hales, Carl C. Fehrle, and Bill Hoff. The one to one or small group contact takes the project off the theory phase and makes it purposeful and meaningful.
The accommodations were fine and the food, great.
It was extremely expedient to have everything located so conveniently in one building.
One thought that was probably personal: I would liked to have had some attempt to clarify the information I was receiving. Thank you again. I feel as if I had found some new and valuable friends.

Staff Member #4

I felt this training session to be the most valuable thus far: The session was more related to our immediate state needs and did not dwell on the broad generalizations encountered at Missouri. The next session should include more of a Superintendent's Workshop. Where one and possibly two superintendents might be involved in seeing and reacting to the Resource Agent's role. Proper superintendent input in the program, from a district level might be of great value. My rationale for this is that these are the men who set the guidelines through which we operate.

Staff Member #5

Your flexibility and interest has always been appreciated and a good job has been done on pinpointing our needs.

EVALUATION OF THE SECOND TRAINING PROGRAM - FEBRUARY 9 - 12, 1971

SHERATON MOTOR INN, PORTLAND, OREGON

1. Do you view the individualization of the second training program at Portland, Oregon, as having been more valuable than the group training of the personnel from all three states in Columbia, Missouri?

Staff Member #1

Yes, in that the visitation team had lst hand knowledge of Missouri of the Agent - (of course, this was impossible before!) and capably utilized agent's Missouri and efforts in field to structure meetings to observed needs.

Staff Member #2

Yes; on the whole, I thought the training in Portland was very good and was tailored to our needs. Although, I felt I received a great deal of valuable information while at the University of Missouri. The sessions with William Hoff helped me tremendously in setting up our office procedures.

Staff Member #3

Yes: Having been in operation for a period of time, it was possible to identify many of our own needs and to plan the session acoordingly. Most of the topics and discussions were relevant and valuable in bringing about a more efficient and comprehensive operation.

Staff Member #4

Didn't participate in the group training.

Staff Member #5

I'm sorry that I cannot comment on this question since I was not with the Project at the time of the Missouri training session.

Staff Member #6

Yes: The individual time that I spent with Glenn White was invaluable. It has helped me to use our OTIS data bank more effectively. The give and take which can be shared in a small group is so much more effective and honest.

2. In the form of general statements, list what you learned from the informal conversations and instruction in the two day training sessions and site visits.

Examples: How to code.
How to contact the state consultants.

Staff Member #1

Least valuable (in terms of agent) but I believe it will lead to greater coop/coordination of Oregon Board of Education team as a team.

Staff Member #2

I learned a great deal more about descriptors and coding technique from Glenn White. He was very helpful and with his instruction I have been able to code requests for the QUERY searches. This had broadened our retrieval service.

Staff Member #3

Better ideas of field agent problems.

Staff Member #4

Better record-keeping procedures
Better use of secretary
Better definition of my role
Better understanding of project goals
Better understanding of the U.S.O.E. expectations

Staff Member #5

1. I picked up the point that we should try for different solutions to problems-since we are a pilot project it's good for us to try all sort of solution methods and pick those which work best for a given set of circumstances.
2. The computer work with Glenn was most valuable-but I can see that it will take time and close communication with OTIS in order for us to get feed back on what works best in retrieving computer data. The theory was fascinating.
3. I learned the value of mutual cooperation with Oregon Board of Education specialists.

Staff Member #6

More effective coding techniques.
the rationale behind batching and how it helps reduce computer costs.
More confidence in computers.
That the ERIC files are not always a satisfactory resource in all topic areas.
That retrieval specialists cannot use their time in manual searches or in reviewing and weeding print-out packets.
That face to face communication with field agents is essential.
How to use the Dictionary of ERIC file.

3. As a result of the formal and informal training, are you better prepared to perform the responsibilities of your role?

Staff Member #1

Yes: From critique of team, I see errors in MO-Viz:
Too personally involved in later phases of projects.
More intensive efforts to involve clients earlier in problem determinations.

Staff Member #2

Yes: It helped me with coding. It gave me a greater understanding of the field agent's role. I also realized the potential of the human resources here at the Oregon Board of Education.

Staff Member #3

A number of suggestions and points which helped to improve the director's role in the program were emphasized. Among these were

1. The need for more frequent and structured meetings for the retrieval staff.
2. The realization that the responsibility of the program should extend beyond the dissemination aspect of the program and include where ever possible the follow-through for effective implementation of ideas.
3. The need for periodic meetings which include the field resource specialists.
4. The need to consider and plan for summer activities.

Staff Member #4

Yes: Application of learning expressed in #2.

Staff Member #5

Yes: The most relevant part of the training for me was the time with Glenn White. I feel that the perceptions of each segment of the project-team will differ in this respect.
As a result of the general discussions on Thursday, I have a better conception of how our project fits in with the systems management and broad objectives of the Oregon Board of Education.

Staff Member #6

Yes: See number 2.

4. The first afternoon, each field agent reviewed one of his cases. Was this of value to you? If "Yes", list the ways: if "no", what would have been more of value?

Staff Member #1

Yes:
1. I love attention and what a grand opportunity this presented!!
2. Could see how predestrian my efforts are with respect to Uniatila County's.
3. Good interaction with other agent and retrieval group.

Staff Member #2

Yes: We have not had the time or opportunity to get kind of feedback until this session. Up until this time

the reports have been limited to television conversations and recorded tapes. The value of this session prompted us to hold periodic meetings for this purpose.

Staff Member #4

Yes: The review of my own case was valuable in that the suggestions and comments received from almost everyone gave me a better grasp on my catalyst role and the problem solving approach to solving problems. The review of one of the cases was valuable in that:
...It's the first time I have heard about anything he is doing.
...It gave me a feeling for how he is approaching his job as compared to how I am functioning.
...I think it would have been valuable for me, had he and I been able to spend time together early in the project as a refresher for the training session I missed.

Staff Member #5

Yes & No: I had already been very involved in one project with ITV and its lengthy discussion of it was not beneficial for me. I felt that it was giving input to the Missouri staff and Mr. Katagiri but we already know about it.
The report that was more interesting and briefer (that can be a virtue) was in hearing described a project in more detail that I'd previously had the opportunity to hear.

Staff Member #6

NO: I was already aware of both projects and had talked with people about them at an earlier date. It did give them an opportunity to communicate with others.

5. List the topics which were discussed which had relevance to your concern. (Include those discussed on the site visits and in the training program.)

Staff Member #1

1. MO of field agent
2. Critiques by visiting team-especially at site visit.
3. Discussion of involveness of agents (depth of involvement) in projects

Staff Member #2

Coding: Communications: Human resources:
Priorities: Publicity

Staff Member #3

Problem solving as a dissemination activity.
Field agent Reports: Priorities: Communication between team members: Interaction between team members.

Staff Member #4
Very difficult to answer specifically!
Review of U.S.O.E. goals
Field Agent Role (catalyst)
Problem Solving: Use of Consultants
I am convinced one gets out of something only as much as he puts into it. My interest was high throughout the session and most of the topics were relevant in some way.

Staff Member #5
The main topic of relevance was efficient ways to conduct a computer search. Also suggestions by Bill Hoff-especially the idea of a monthly briefing session for all members of the team. Working symbiotically with O.B.E. professionals. Learning to get at the problem rather than being stuck first on a solution.

Staff Member #6
A. How USOE and OBE goals compliment each other.
B. All of those listed in #2
C. Problem solving
D. Role of the field agent.

6. List additional areas or questions you would like to have discussed (What do you see as implications for training in the third training program?)

Staff Member #1
NONE

Staff Member #2
The retrieval process

Staff Member #3
I would like to go into some of the theoretical aspects of dissemination, but I do not think this would be a popular topic for all team members. Some innovative ideas and projects to disseminate. Implementation problems. Evaluation of the project as of a given time
Practical evaluation methods of implementation.
Writing proposals for continuation of the present program.

Staff Member #4
The other things I would like to discuss are what we call "in-shop" topica.
...more specific statement of what we (as the Oregon team) feel should be the contribution of the project by Dec. 31, 1971.
...more specific determination of long range goals for use of the ERIC file.

...a team approach to plan some of the activities together, that might be implemented in County.

Future training?

I suggest we (Oregon Team) determine during the next few months just what our highest priority needs are and as a group recommend a plan of action to the trainers. At least for their consideration.

I suggest Columbia (Sam) gives us a report on just how they feel the project is going. As I understand it, Dr. Love is the Personal communication link between where the action is and where documentation is taking place.

I guess what I am saying, is that I feel some evaluation at an intermediate point in time could compliment our own self-evaluation. It might be interesting to hear from an outside source their assessment of what is happening. Maybe this is impossible and shouldn't be expected.

Staff Member #5

How to work up a systematic interest profile system (where we pass on relevant data unsolicited to interested individuals).

How to set up and utilize a file on innovative programs in all areas and at all levels.

Staff Member #6

I need to work side by side for several days with an experienced retrieval specialist.

I need to spend a day or two in a good retrieval center observing general office procedures and work flow of people involved.

I need a good workshop in-service on project management to include: Goals and objectives: Work Breakdown structure: Network development: Supporting techniques.

7. What areas covered in the site visit and/or training program that might have stimulated you into deeper research (investigation) on your own? (Include those you plan to research or solve).

Staff Member #1

The commentaries by Missouri team and Oregon Board of Education people concerning goals. The presentation in coding, etc.

The MO of agents.

Staff Member #2

No answer

Staff Member #3

1. More systematic procedures for communication within the team.

2. More attention to the implementation of ideas and innovations.
3. Profile and interest files and services.

Staff Member #4

I was stimulated to better define my goals. In sketchy outline form and subject to change;
1. Unlock the use of the ERIC File for a representative group of educators in Umatilla County.
2. Determine a priority list of needs in the area of primary reading.
...Research (ERIC, consultants, teachers) to find possible solutions for the problems.
...Disseminate needed information in a usable form to the teachers who need it
...Involve teachers, consultants, and interested people in ITV and on the sight regional meetings to help plan, assess needs, interpret retrieved information, and determine best implementation procedures.
3. Zero-in on the improvement of career counseling and exploratory career activities in the 12 high schools in Umatilla County. OTIS 9 of the schools account for a grand total of 1400 students no counselor in most.
4. Handle as many individual projects as possible.
5. Further experiment with ITV In-service for teachers.
The above are in the development stage, will involve team planning here at the IED and at the OBE.

Staff Member #5

The utilization of QUERY. Glenn indicated that if we hope to enlarge our service, we will have to develop both more accurate coding techniques and also think in terms of diversifying our computer based data retrieval system.
We plan another training session at OTIS for the retrieval staff-plus a training session at OBE.
Problem identification as pertains to narrowing down the computer search. i.e. who is it for? To what use will it be put? What age-grade level is it for?
Setting up a file of innovative programs for those requests which need this type of information.

Staff Member #6

Answered in #2 and 6.

8. What contribution did this training program make toward assisting you in understanding the components of the entire Oregon project and the responsibilities of your role in accomplishing the goals of the state project?

Staff Member #1

1. Goals, clarification and statements regarding
   a. Agents role
   b. Evaluation of agent's Missouri as observed

Staff Member #2
Helped to see the overall picture more clearly.

Staff Member #3
It was the first time the entire team spent a prolonged period of time together to share ideas. It was most helpful in crystalizing the overall objectives of the program and identifying the roles and responsibilities of individual team members.

Staff Member #4
1. It helped me better define my goals and role.
2. It set the stage for the Oregon Team to do some necessary communicating.

Staff Member #5
The main contribution was that I was able to understand the functioning of the field agents on a day to day basis.

Staff Member #6
Covered in other sections.

9. Comments ... Complaints ... Compliments:

Staff Member #1
Very good-need visit to agents in other projects-need visit to Missouri System to observe agents-Need to see office systems of Missouri Agents. Pleased with Missouri's commentaries and evaluations during site visit.

Staff Member #2
The training session was valuable to me especially the instruction on coding.

Staff Member #3
The idea to shift the training session to the local state was a good one. It permitted a type of interaction which could not have been accomplished by any other means. The sincerety, expertise, dedication of the training team members is most appreciated.

Staff Member #4
I felt the Missouri team attempted to guide us through an experience that would be most valuable to us. Good Job! It is difficult to describe everything that took place here in my county during the on-site visit. It was a tremendous value to me to be able to discuss in some depth what I was feeling and doing with people competent enough to turn what I said into a meaningul learning experience. Basically, Bill and Randy listened to me, then tried to offer the kind of help, information, or suggestions that were most appropriate. If I had to make a decision: "one or the other?" I'd have to take

the on site visit over the group meeting as being most valuable to me. However, the group meeting in Portland did lay the foundation for some meaningful more sweeping improvements in the Oregon project as a whole.

Staff Member #5
Your questionnaire just about took care of everything.

Staff Member #6
Nice people, good communications, mostly pertinent, food fellowship, trust level is improving.

L. Do you view the individualization of the second training program at Columbia, South Carolina, as having been more valuable than the group training of the personnel from all three states in Columbia, Missouri?

Staff Member #1
Yes
Although it is difficult to compare the two training sessions because their goals differed, I do believe that the individualization was more valuable to the South Carolina group for the second training program. One significant aspect of this type of program was that all staff members could participate in the training sessions.

Staff Member #2
Yes
This second training program was aimed more specifically at S.C.'s particular needs. However, I don't think that this means another group session of all three states and Missouri could not be beneficial. I think an on-site visit to one of the three states for the next training session might be most valuable in the exchange of ideas among all 3 states. It could be most realistic, in that discussion could center around what has and has not worked in this on-site state, and comparisons and contracts made concerning these same operations in the other two states.

Staff Member #3
I would not say that one training program was more valuable than the other because both sessions were so completely different and both had individual merit. The first training session, being more of an orientation or an overview of the project was in logical sequence with the individual site visits pointing up certain generalizations which had been discussed during the initial training session.

Staff Member #4
I view the individualization of the second training program as having been more valuable than the group training program in that it was geared to give assistance to the needs as individual state needs. However, it is difficult to compare an individualized training program with a group training program as objectives are different. I would term both programs as valuable.

Staff Member #5
Not applicable. (I did not attend the group training program.)

Staff Member #6
I do not feel qualified to make a comparison between the two sessions, as I did not attend the group training in Missouri.

Staff Member #7
Since I did not attend the first training program in Missouri, I can't really make a comparison. I did, however, enjoy and learn much from the small Friday sessions.

Staff Member #8
Did not attend group training session in Missouri.

Staff Member #9
I did not attend the training session in Missouri.

2. In the form of general statements, list what you learned from the informal conversations and instruction in the two day training session and site visits.
Example: How to motivate people.
How to contact the state consultants.

Staff Member #1
Process and product evaluation suggestions.
Suggestions for building a consultant file.

Staff Member #2
Some various ideas concerning the construction of topical files, including cross filing.

Staff Member #3
a. A new awareness of the South Carolina project as a hole-supervision, retrieval, and communication of processed information.
b. New ideas to disseminate the information to a wider audience (Bill Hoff).
c. General information related to the development of an advisory council
d. The importance of role definition

Staff Member #4
a. Ways to obtain immediate feedback from clients.
b. Resources needed to establish an information system.
c. Assistance in clarifying and understanding duties of the communication specialist.
d. Assistance in utilizing an advisory committee.
e. Assistance in problem-solving.
f. An awareness of the need to understand job description and role involvement.

Staff Member #5
1. Better means of filing
2. How to properly channel contacts with specialists

3. Clearer understanding of the flow process
4. Concerns are common to all staff members--not peculiar to one.
5. Means of evaluation of package (postcards, etc.)

Staff Member #6

How to develop a human resource file.
Some methods of evaluation for our program (e.g. possible checks on information utilization).
The role and responsibilities of the communications specialist.
How to put the overall purpose of RIU into perspective.
In other words, do we merely hand out information, do we initiate change, or what?

Staff Member #7

How to communicate more clearly
Better ways to set up reference files
How to better use resources outside our office.

Staff Member #8

Nothing listed.

Staff Member #9

Nothing listed.

3. As a result of the formal and informal training, are you better prepared to perform the responsibilities of your role?

Staff Member #1

Yes
The training session permitted us to take two days from our on-going activities and to look at the project status through the eyes of the Missouri personnel. This type of activity assists one to clarify role responsibilities.

Staff Member #2

Yes
A greater sense of the over-all operation of the project was gained, so that, in a sense, the retrieval operations don't seem as isolated to me as they occasionally did in times past.

Staff Member #3

Yes
I have more awareness of certain project areas which I previously did not have.

Staff Member #4

Yes
Beliefs pertinent to functional role of Communication Specialist and project involvement were re-enforced.

Staff Member #5

Yes

The openness involved in the group discussions was healthy, for I learned exactly what my role entailed and exactly what was expected of me from my co-workers. Also, beneficial suggestions were offered which applied to my role.

Staff Member #6

Yes

Because I have been with the unit only a short time, I feel that these sessions helped me to pull together the bits and pieces of my job and look at it in a broad context. Many definite practical and/or technical suggestions were also beneficial to enabling me to perform more efficiently.

Staff Member #7

Yes

I now better understand how to communicate instructions to people. The film showed on this subject was very helpful. Mr. Hoff gave some very good ideas on how to change our topic files and how to use various information sources.

Staff Member #8

Yes

Received many helpful ideas of how to better set up and perform such duties as billing, ordering microfiche, receiving payments, filing, etc.

Staff Member #9

Yes

Having been just recently employed by the State Department, the training session enabled me to more fully understand the purpose and the responsibilities of my role and how my role corresponds with the entire staff.

4. Thr first afternoon, each field agent reviewed one of his cases. Was this of value to you?

Staff Member #1

Yes

Although I was quite familiar with the steps involved in each case study, it was interesting to hear in narrative form and of special value to the staff.

Staff Member #2

Yes

1. Saw clear evidence of response in the field to the work of our program.
2. Saw a clearer picture of the linkage between retrieval work and field agent work.

3. Saw that there is need in the field for the services we are rendering.

Staff Member #3

Yes

The steps through which each case study develops are interesting and diverse. I was more enlightened after hearing a case study originating in a district. Each case study followed the ideal pattern of contact, request, problem-solving techniques thru processed information and SEA consultants and new programs spawned as a direct result of research information availble.

Staff Member #4

No answer

Staff Member #5

Yes

As we emphasized during the session, we in Columbia not only want to know what is happening in the target areas, but we need to know. The field agents' reviews provided us with a real picture of where our work goes and what it does.

Staff Member #6

Yes

Gave me a greater insight into the role of the communications specialist.

Enabled me to witness the initiation and culmination of a process of which our office performs only one part.

Gave me a certain sense of satisfaction in knowing that the utilization of research information can make a difference.

Lent a sense of "reality" to the whole project. It is often difficult to connect our office work with individuals and their problems.

Staff Member #7

Yes

The discussion gave me more insight on the work of the communication specialsits. It is very helpful to see how our product is used. The discussion helped to tie our work to the work of the communication specialists. It is very easy to lose sight of this relationship if one doesn't work with the communication specialists on a regular basis-as is my case.

Staff Member #8

Yes

Helped me to know how the complete cycle of receiving requests ,finding information, and returning information is disseminated by the field agents. To hear how they follow

through with their clients showed me what kind of position they fill and how well they perform their duties.

Staff Member #9
No answer

5. List the topics which were discussed which had relevance to your concern. (Include those discussed on the site visits and in the training program.)

Staff Member #1
Group process to discuss items of importance to the staff
B. Hoff's assistance in office procedures
Development of consultant file
Suggestions for evaluative procedures for Project activity and product.

Staff Member #2
Retrieval of relevant data
Utilization of the material
Building of human resources file

Staff Member #3
1. more intensive probing with client during discussion sessions and emphasis on question negotiation
2. advisory council
3. group interactions and participation (Paul King).

Staff Member #4
(a) Site Visit:
1. The functional role of the Communication Specialist within the existing structure of the school system.
2. Leadership responsibilities in group process.
3. Group process analysis: problem identification, follow-up, and utilization.

(b) Training Program:
1. Utilization of local resources.
2. Establishing a local information resource system.
3. Approaches in problem-solving activities.
4. Utilization of an advisory committee: advantages and disadvantages.

Staff Member #5
1. Flow Process
2. Evaluation
3. Motivation and Attitudes

Staff Member #6
1. Attitude and Communication - specifically, the change agent role discussion and the development of an effective rapport with requesters.
2. Effective ways of identifying and using consultants.

3. Cataloging and cross-referencing of all reference materials.

Staff Member #7
Filing
Case Studies
Discussion of general problems and philosophies, both technical and abstract.

Staff Member #8
Mr. Hoff discussed with me better procedures for setting up my personal files--Also how to better establish our billing and payment procedures concerning the ordering of Microfiches.

Staaf Member #9
The filing systems and bulletin board, at present one of the filing systems demonstrated to us is working very well; we hope to soon have a second system in effect.

6. List additional areas of questions you would like to have discussed. (What do you see as implications for training in the third training program?)

Staff Member #1
Discussion of objectives and methods for reaching these objectives by project states.
What are the major problems facing project directors
Do the project directors see "over-run" of their existing systems? What methods are being utilized to determine if educational information utilization really does make a difference?

Staff Member #2
A comparison of successful and unsuccessful modes of implementation in the three states.

Staff Member #3
Utilization of research information. This area was slighted during the training session probably because of insufficient time. However, I wanted some feedback on our format through which we return information and techniques which get clients interested in utilizing the research data.

Staff Member #4
Cannot determine at this time.

Staff Member #5
1. Promising Practices Files and Conventions
2. Continuation of Evaluation Discussion
3. How to Better Educate District Representatives.

Staff Member #6

1. More specific information on techniques of evaluation.
2. Expansion of our services. What alternatives exist when we have developed our resources and compiled an extensive reference file? Should our role change? What other activities could we become involved in?

Staff Member #7

I would like to have spent more time on the actual process of information retrieval and dissemination.

Staff Member #8

No answer

Staff Member #9

Everything concerned with my duties was covered well; I cannot think of any questions I would have needed answered.

7. What areas were covered in the site visit and/or training program that might have stimulated you into deeper research (investigation) on your own? Include those you plan to research or solve.)

Staff Member #1

I am greatly interested in information-dissemination systems and continue to research this topic. Bill Hoff's suggestions for card filing systems stimulated a staff brainstorming session. We took his ideas and developed a system we believe will work for us. We are identifying each request by 1 to 3 descriptor terms and filing according to descriptive terms. We are identifying books, pamphlets, and articles which we have on file by the same method. It seems to be working. Still exploring ways to determine if the utilization of research information makes a difference. Actively involved in the development of guidelines for the determination and collection of promising practices. Dr. Koelling's suggestions in this regard were valuable.

Staff Member #2

No answer

Staff Member #3

Suggestions which were made by the University of Missouri training team at the LRC site had particular merit and will be followed-up, especially the idea of having a team (college and public school) assist in the evaluation of the LRC project.

Staff Member #4

The Communication Specialist and information disseminstion: His role in disseminating and using research information in problem-solving and innovative activities in a large school district.

Staff Member #5
Evaluation and Filing

Staff Member #6
The sessions on filing and the development of a human resource file are the most pressing needs of the unit. I hope that we can work towards improvements in these areas. With respect to the concept of more effective communication with the requesters, we have tried in our recent District Representatives' meeting to become better acquainted with those whom we will be serving outside of the target districts.

Staff Member #7
The use of additional information sources-especially human resources.
The role of education-just in general ways. I learned more and we have more questions about education than I ever got in my education classes.

Staff Member #8
No answer

Staff Member #9
No answer

8. What contribution did this training program make toward assisting you in understanding the components of the entire South Carolina project, and the responsibilities of your role in accomplishing the goals of the state project?

Staff Member #1
Whenever I meet with the entire or partial staff, I am consciously aware of the responsibility I have to them and cognizantly striving for a teamwork situation which will bring out the best potential within us all.

Staff Member #2
Saw our retrieval product in terms of how it appears to educational personnel in the field and in terms of the suggestions and alternatives it presents to education.

Staff Member #3
The staff in South Carolina has established a close and and satisfactory working relationship--I think the largest contributions that the Univeristy of Missouri personnel made was in bringing together each staff member, and as a catalytic agent, encouraging staff members to open up discussions concerning each particular phase of the operation - awareness and sensitivity were thus heightened.

Staff Member #4
An awareness of the importance of each component of the state program and how each compliment the other in accomplishing desired goals.

Staff Member #5
No answer

Staff Member #6
This training contributed much to my understanding of the entire South Carolina project, and of my part in this project. Understanding the communications specialists' roles and the importance of communication with the individuals whom we serve has enabled me to understand the service which this project offers to the state and of how an efficient performance on my part will help this project to be more successful.

Staff Member #7
Discussing the case studies really put the project into perspective for me. I often lose sight of the main goals of the project because I work with the school districts which are an addition above the primary scope of the project.

Staff Member #8
It helped me understand how the project runs and since I have only worked for the Dept. of Education RIU, since February, it was of tremendous interest to me. I had never seen the Project as a whole until the Training Session, where all members of RIU including the field agents were present.

Staff Member #9
In discussing each individual's role, I was able to see how we all fit together to represent the South Carolina project and better able to understand the goals we are to accomplish.

9. Comments...Complaints...Compliments:

Staff Member #1
Thank you, Carl, and the other trainers, for a sincere interest in the Pilot Projects and a committment to providing sessions to meet our diverse needs.

Staff Member #2
Comment: See #1. Would like a training session held in one of the three project states to facilitate concrete discussion and comparison of operations of the on-site state and other two states.
Compliment: It appears that all three states and the University of Missouri are more aware now of what each other is doing and about, than at the beginning of the

Project. This indicates a flow of communication between all four. The more ideas we can exchange between now and the Project's end, the more successful will be our projects, and the greater the chance for the other states' benefitting from the work of our Pilot States.

Staff Member #3
No answer

Staff Member #4
I feel that the training team directed the training program to the needs of the entire staff and individual staff members. I also feel that the site visits and the individualization of the training program provided insight for the training team as to the South Carolina project and re-enforced goal directions for the State Staff.

Staff Member #5
No answer

Staff Member #6
The training sessions were surprisingly relevant, practical, and even exciting. I felt that the entire staff became involved and that everyone learned a great deal about the project and the individual's role in the project. The initial sessions with Dr. King were particularly stimulating and as important as the later more practical and technical sessions. It was obvious that the training staff endeavored to coordinate their in-put with our specific needs, which made the sessions seem consistently worthwhile.

Staff Member #7
I enjoyed the two days of training very much. However I would have given more time to the discussions of Friday and quite a bit less time to the discussions of Thursday morning and early afternoon. This is purely personal prejudice because I am fascinated by the technical side of retrieval and dissemination and have a bit less interest in the more abstract ideas discussed.

Staff Member #8
All members of the University of Missouri, Columbia, showed so much concern and interest in the well-being of our Unit. I felt very proud to be a member of this Unit, and I know that all the work and ideas put into the training session will be of help to better perform our duties.

Staff Member #9
I think the training program was very enjoyable and worthwhile. Each person represented his part in the program very well and the entire session was interesting and helpful to all; the session had something of importance to each individual.

# APPENDIX N

## Check Lists To Prepare For Third Training Program

PILOT STATE DISSEMINATION PROGRAM

Check-Sheet for Third Training Program
to be held in Kansas City
October 12, 13, and 14, 1971

Directions: Please check all of the topics in which you are especially interested in receiving training. Double-check those topics which are of utmost concern. (At the end of the list there is space for you to write in additional training needs.)

## C. Items for Retrieval Staff

Section I

_____ New developments or trends in education, promising practices throughout the country

_____ The strategy or philosophy of educational innovation

_____ Organizational barriers to educational change

_____ Psychological barriers to educational change

_____ Community barriers to educational change

_____ How to evaluate new educational practices

_____ The general relationship of the project to the target areas and how this relationship could be improved

_____ The relationship of the project to other activities or divisions of the SEA

_____ The USOE's expectations for the project

_____ Relationship of the dissemination project to other USOE activities or programs

_____ Determining priorities in goals

_____ How field agents in other states are operating

_____ Explaining or publicizing the dissemination project, creating awareness of your role

_____ Understanding of the different styles of field agent activities (e.g., systems approach versus individual approach) and the possible consequences of each style

_____ Reaching and helping schools that are "backward"

Identifying the appropriate experts and consultants in:

_____ the SEA

_____ local universities or colleges

_____ How best to use the human resources in the SEA

_____ Availability of resources other than ERIC, e.g., libraries, conferences, R&D Centers, Regional Labs

_____ Identification of exemplary practices in your area

Section IV

_____ How to develop a file of exemplary programs and experiments which have been tried by school districts in the state (or adjacent states)

_____ More effective coding techniques or coding time-savers in using the QUERY program, possibly involving modifications of QUERY

_____ Observation of a retrieval center in operation: its general office procedures, work flow, division of labor among staff, filing system, etc.

_____ Discussions with an experienced retreival center or information service director about various issues or problems in the operation of such a service

_____ Information on how the ERIC clearinghouses operate: the rationale determining which clearinghouse handles research on what topics in education research, where overlap occurs between clearinghouses and how to expect it; the consistency (or inconsistency) of indexing practices among the clearinghouses, etc.

_____ Guidelines for determining which requests require a manual search in addition to a computer search, or which requests can be more efficiently answered by a manual search

_____ All aspects of conducting computer searches

_____ Strategies for manual searches; available resources

_____ The meaning of "utilization of educational research". (E.g., What is the role and the responsibility of the retrieval center in this? What are the ways in which research might be utilized?)

_____ The concept of the change agent: e.g., whether and how both the field agent and the retrieval specialist should take on this role; how each should define it, and techniques for achieving it

_____ More skill in understanding and interpreting educational research, developing alternative possibilities and presenting them to clients; the responsibility of the retrieval center in this and techniques for achieving it

_____ Responsibility of the retrieval center for screening output of computerized searches for relevance to client's request

_____ Ways of making educational research more relevant to clients in the schools

_____ The "systems" approach to educational improvement

_____ Bureaucracy, theory and practice

_____ Role(s) delineation - setting parameters for self and client - expectations

_____ Impact evaluation; stages and levels

_____ Diffusion strategies and techniques

_____ Conflict management

_____ Preparing for and using consultants

_____ Improving communication or exchange of practices between schools or districts

_____ Improving school/community relations

Section II

_____ Understanding the goals of the project as a whole

_____ Understanding your own goals, clarifying the project's expectations of your role

_____ Identifying the needs or problems of clients

_____ Translating the client's needs or problems into retrievable information

_____ Using CIJE, RIE, etc. for manual searches

_____ Using ERIC thesaurus

_____ Motivating a client's interest in information that has not been specifically requested

_____ Encouraging "self-renewal" activities among the school population; institutionalizing the use of research

_____ Assessing your impact on clients, evaluating your services

_____ Informing school staff throughout a target area about information that others in the district are using, that is, spreading the impact of information or innovation

Section III

_____ How the dissemination program is being operated in the other two states

_____ Relationship of the project to the SEA -- how to improve services to SEA, how to utilize resources of SEA; integration of the project into SEA

_____ New developments or trends in computerized retrieval systems

_____ Communicating with field agents, e.g., learning about their activities, giving direction or assistance

_____ Using educational technology in disseminating information directly to schools

_____ Using intermediate agencies for information dissemination

_____ Developing packages of information on special educational topics

_____ Developing problem-solving packages for school personnel

_____ Involving more schools in the project (either inside or outside the target areas)

Your own recommendations:

# APPENDIX O

## Compiled Results of the Check List

Results of Check-Sheets for Third Training Program to be held in Kansas City. October 12, 13, & 14, 1971

TO: People Interested in the Third Training Program

FROM: Check Sheets checked by Trainees

Check sheets compiled by:

Sam Sieber
Charles H. Koelling
Carl C. Fehrle

The following were checked by the field agents as the items of utmost concern.

* Checked by 75% or more of the people.

A. Items for Field Agents

1. New developments or trends in education, promising practices throughout the country.
2. How to evaluate new educational practices.
3. The USOE's expectations for the project.
4. Determining priorities in goals.
*5. How field agents in other states are operating.
6. Understanding of different styles of field agent activities (e.g., systems approach versus individual approach) and the possible consequences of each style.
*7. Helping clients to understand or interpret information.
*8. Helping clients to translate research into action alternatives.
*9. Helping clients to select appropriate solutions.
*10. Motivating clients to utilize information, to try-out new practices.
*11. Helping clients to install innovations, helping in implementation.
12. Motivating or training administrators to encourage follow-up on the part of teachers.
13. Deciding how involved the field agent should become in installing new practices.
14. Assessing your impact on clients, evaluating your services.
15. Setting up or conducting programs in education innovation, change-strategies, self-renewal activities, etc.
16. Setting up an in-service program.
17. Understanding or mediating local disputes.
18. Reporting to the project director, retrieval staff, evaluation team, etc.

The following were checked by the project directors as the items of utmost concern.

B. Items for Project Directors

1. How to evaluate new educational practices.
2. Identification of exemplary practices in your area.
3. Developing packages of information on special educational topics.
4. Developing problem-solving packages for school personnel.

The following were checked by the retrieval staff as the items of utmost concern.

* Checked by 75% or more of the people.

C. Items for Retrieval Staff

1. New developments or trends in education, promising practices throughout the country.
2. The general relationship of the project to the target areas and how this relationship could be improved.
3. Availability of resources other than ERIC, e.g., libraries, conferences, R&D Centers, Regional Labs.

*4. Identification of exemplary practices in your area.

5. Translating the client's needs or problems into retrievable information.
6. Assessing your impact on clients, evaluating your services.
7. New developments or trends in computerized retrieval systems.

*8. Developing packages of information on special educational topics.

9. Developing problem-solving packages for school personnel.
10. How to develop a file of exemplary programs and experiments which have been tried by school districts in the state (or adjacent states).

*11. More effective coding techniques or coding time-savers in using the QUERY program, possible involving modifications of QUERY.

12. Discussions with an experienced retrieval center or information service director about various issues or problems in the operation of such a service.
13. Information on how the ERIC clearinghouses operate: the rationale determining which clearinghouse handles research on what topics in education research; where overlap occurs between clearinghouses and how to expect it; the consistency (or inconsistency) of indexing practices among the clearinghouses, etc.

14. Guidelines for determining which requests require a manual search in addition to a computer search, or which requests can be more efficiently answered by manual search.

15. All aspects of conducting computer searches.

16. The meaning of "utilization of educational research." (E.g., What is the role and the responsibility of the retrieval center in this? What are the ways in which research might be utilized?)

17. More skill in understanding and interpreting educational research, developing alternative possibilities and presenting them to clients; the responsibility of the retrieval center in this and techniques for achieving it.

18. Responsibility of the retrieval center for screening output of computerized searches for relevance to client's request.

19. Ways of making educational research more relevant to clients in the schools.

# APPENDIX P

## Assigned Assignments For The Retrieval Staff

University of Missouri - Columbia

101 Hill Hall
Columbia, Mo. 65201

COLLEGE OF EDUCATION
Office of Continuing Professional Education

Telephone
314-882-6821

September 9, 1971

RETRIEVAL STAFF ASSIGNMENTS FOR THIRD TRAINING SESSION

Dear

In organizing "your concerns" the Training Team has grouped them under the following broad topics. They are:

A. Identification of Exemplary Practices

1. New developments or trends in education, promising practices throughout the country. (Charles Hoover)
2. Availability of resources other than ERIC, e.g. libraries, conferences, R&D Centers, Regional Labs and Institutions of High Learning. (Charles Hoover)
3. Identification of exemplary practices in your area.
4. How to develop a file of exemplary programs and experiments which have been tried by school districts in the state (or adjacent states). (Bill Hoff)

B. Retrieval Problems and Issues

1. Translating the client's needs or problems into retrievable information. (Glenn White)
2. New developments or trends in computerized retrieval systems (Glenn White)
3. More effective coding techniques or coding time-savers in using the QUERY program, possibly involving modifications of QUERY. (Glenn White)
4. Information on how the ERIC clearinghouses operate: the rationale determining which clearinghouse handles research on what topics in education research; where overlap occurs between clearinghouses and how to expect it; the consistency (or inconsistency) of indexing practices among the clearinghouses, etc. (Charles Hoover)
5. Guidelines for determining which requests require a manual search in addition to a computer search, or which requests can be more efficiently answered by a manual search. (Glenn White and Bill Hoff)
6. All aspects of conducting computer searches.

C. Evaluation of Retrieval Services
Part I "In House"
Part II "Evaluation of Services to Users"

1. Assessing your impact on clients, evaluating your services. (Glenn White and Bill Hoff)
2. Responsibility of the retrieval center for screening output of computerized searches for relevance to client's request. (Glenn White and Bill Hoff)

D. Developing Information Packages for Target Groups

1. Developing packages of information on special educational topics. (Glenn White and Bill Hoff)
2. Developing problem-solving packages for school personnel. (Glenn White and Bill Hoff)

E. Management (Bill Hoff)

1. The general relationship of the project to the target areas and how this relationship could be improved.
2. Discussions with an experienced retrieval center or information service director about various issues or problems in the operation of such a service.

F. Utilization (Bill Hoff)

1. The meaning of "utilization of educational research." (E.g., What is the role and the responsibility of the retrieval center in this? What are the ways in which research might be utilized?)
2. More skill in understanding and interpreting educational research, developing alternative possibilities and presenting them to clients; the responsibility of the retrieval center in this and techniques for achieving it.
3. Ways of making educational research more relevant to clients in the schools.

We have made tentative assignments for leadership. However, we are depending on your "input" of questions and reactions.

Sincerely,

Carl C. Fehrle

Carl C. Fehrle
Associate Director of
Pilot Dissemination Project

cc: Dr. Charles H. Koelling
Dr. Sam Sieber
Dr. John Coulson
Dr. Dee Ashworth
Dr. George Katagiri
Dr. Kenneth Linsday
Mr. Bill Hoff
Mr. Glenn White
Dr. A. Sterl Artley
Dr. C. Edward Carroll
Dean Donald W. Fancher
Dr. Larry Hale
Dr. Randel K. Price

# APPENDIX Q

## Third Training Program

UNIVERSITY OF MISSOURI - COLUMBIA

Pilot Training Project for Personnel Participating

in Pilot State Dissemination Program

Hotel Muehlebach

Kansas City, Missouri

Third Training Program - October 12-14

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Especially designed for: Project Directors

Field Agents

Retrieval Staff

Charles H. Koelling, Director

Carl C. Fehrle, Associate Director

ENJOY YOUR STAY!

To make your stay in Missouri more pleasant, the following have been assigned to serve as hosts:

Friends from Oregon - Randel Price

Friends from Utah - Larry Hale

Friends from South Carolina - Glenn White

Friends from U.S.O.E. - Charles Koelling

Friends from Columbia University - Bill Hoff

Guest Speakers - Carl Fehrle

Each of you was sent a name tag. This tag is part of a 6" x 6" square. (Five or six tags make a 6" x 6" square.) To help you get started, the following could check the matching of tags. While you are checking this you might discuss your most rewarding experience with the project this year.

Randel Price - George Katagiri

Rob Fussell - John Coulson

Steve Stivers - Glenn White

Charles Koelling - Karen Louis

John Newfield - Sam Sieber

Ken Lindsay - Larry Hale

Jack Bech - Karen Louis

Jerry Hawley - Steve Stivers

Kathy Wallentine - Michael Call

Rosie Mosier - Ellen Tollison

Ellen Folger - Ruth Nielsen

Al Evans - Dave Church

Bill Hoff - Dee Ashworth

Tammy Crolley - Dick Elmendorf

Norm Kohler - George Katagiri

Monday Evening - October 11, 1971

7:00-9:30 Arrangements have been made to reserve the Cask Room at Hotel Muehlebach for the project people to converse and eat. There will be no formal meal, but you may order from the menu anytime between 7:00-9:30 p.m.

Tuesday, October 12, 1971

| Time | Activity | Leader | Hotel Muehlbach |
|---|---|---|---|
| 8:30 a.m. | Greetings | Charles H. Koelling | Burgandy Room |
| 8:40 | "Goals of the N.C.E.C." | John Coulson | " |
| 8:50 | A Review of the Training Plans | Carl C. Fehrle | " |
| 9:00-10:15 | Available Resources for All Project People to Know | Charles Hoover | " |
| 10:30-12:00 | Review of the San Mateo Project<br>Managing the project, retrieving resources and getting the clients to utilize the information.<br>Questions - Answers | Frank W. Mattas | " |

Notes

12:00-1:30 Lunch (On Your Own)

Tuesday Afternoon, October 12, 1971

| Time | Activity | Leader | Room |
|---|---|---|---|
| | **For Field Agents** | | |
| 1:30-4:30 | Each field agent has been alerted to review one of his cases briefly. As the case is reviewed, Larry Hale will use "grids" to record actions.<br><br>Things to consider:<br>Roles the Field Agent Played<br>The Response of the Client<br>Categories of Activities<br><br>Reaction from the field agent on:<br>Follow-up at the Time -- in the Future<br>Changes if Done Again<br>Any Tricks of the Trade | Larry Hale - Presiding | Burgandy Room |
| | **For Retrieval Staff** | | |
| 1:30-4:30 | At this session Bill Hoff will assist the Trainees:<br><br>Develop a check list for the Information Retrieval and Dissemination function.<br><br>Begin developing a manual of operating procedures. | Bill Hoff - Presiding | Room 1 |
| Evening | On Your Own | | |

Tuesday Afternoon, October 12, 1971

1:30-4:30 Three Work Sessions
Sometime during the afternoon, each trainee will have time to show and explain the items he/she has brought. Examples - Books, pamphlets, newsletters, data gathering forms, periodicals to keep abreast of innovations, evaluation forms, case studies, etc.

| Time | Activity | Leader | Room |
|---|---|---|---|

For Project Directors

| | | | |
|---|---|---|---|
| 1:30-4:30 | Frank W. Mattas will continue to assist project directors in solving their problems. Topics to consider are:<br><br>How to make your project indispensible.<br><br>How to keep your people informed on new innovations.<br><br>How to evaluate and promote staff members.<br><br>How to do a self-evaluation of your project.<br><br>How to "sell" your product to the client.<br><br>How to be democratic and still exert leadership.<br><br>Problems - Questions - Opinions | Randel Price - Presiding | Room 2 |

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Wednesday Morning, October 13, 1971 - Carl Fehrle Presiding

| Time | Activity | Leader | Room |
|---|---|---|---|
| 8:30-10:00 | Presentation and Discussion<br>Topics: Using Guidelines for Research<br>Internal and Extrinsic Criteria<br>Advantages and disadvantages of Screening the Print-out.<br>Questions - Comments | Caroline Persell | Burgandy Room |
| 10:00-10:30 | Utilization of Materials<br>Selling Your Product<br>Evaluating the Situation to Determine if the Client has the "Freedom" to Make Change.<br>Becoming Knowledgeable About New Innovations<br>Being Aware of the Extent of the Field Agent's Involvement in Installing New Practices.<br>Helping the Client Select Appropriate Solutions.<br>Developing Guidelines for Packaged Materials. | Ed Beaubier | Burgandy Room |
| | For Field Agents & Project Directors | | |
| 10:30-12:00 | Discussion - Questions over Ed Beaubier's presentation.<br>Ed will assist each in making a decision or finding a solution. | Charles Koelling | Burgandy Room |
| | For Retrieval People | | |
| 10:30-12:00 | Discussion - Questions over Caroline Persell's presentation.<br>Continue the work started on at 8:30.<br>Questions - Answers | Glenn White | Executive Conference Room |
| Lunch | (Cask Room - Hotel Muehlbach) | | |

Wednesday Afternoon, October 13, 1971

Two Work Sessions

| Time | Activity | Leader | Room |
|---|---|---|---|
| | **Project Directors and Field Agents - Larry Hale Presiding** | | |
| 1:30-4:30 | "Diffusing Information to the Client"<br>To apprise project personnel of the multiplicity of conditions which influence the successful use of scientific information by user clienteles.<br>To apprise project personnel of some key variables, particularly those relating to the informational system that enhance or impede information transfer and use.<br>To provide a frame work within which to meaningfully discuss problem issues encountered by project personnel in their work as information agents. | Herbert F. Lionberger | Burgandy Room |
| | **Retrieval People** | | |
| 1:30-4:30 | Finding Solutions to Questions Presented to Glenn<br>Working on Logic<br>Ways to Sophisticate Your Techniques<br>Readiability - validity<br>Abstracting | Glenn White | Executive Conference Room |
| Evening | On Your Own | | |

Thursday Morning, October 14, 1971

Two Work Sessions

| Time | Activity | Leader | Room |
|---|---|---|---|
| | For Project Directors and Retrieval Staff | Bill Hoff - Presiding | Burgandy Room |
| | ( it is most important that the project directors attend this work session) | | |
| 8:30-11:30 | Continue the work on the manual of Operating Procedures. | | |
| | Develop written policies for the various functions. | | |
| | Request that each state return a copy of the results and send the other two states copies for examination. | | |
| | For Field Agents | Charles Koelling- Presiding | Junior Ball Room |
| 8:30-11:30 | Pot-Pourri<br>Panel Members - Randel Price, Larry Hale and Herbert Lionberger | | |
| | (Contributors - Rob Fussell, Norm Kohler and Tammy Crolley. During the first two days these people are responsible for giving the panel questions and problems.) | | |
| | This session will be used to cover the areas of concern that have not been answered previously. | | |
| | An unstructured session - with structure. | | |
| 11:30-1:00 | Lunch (On Your Own) | | |

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Thursday Afternoon, October 14, 1971 - Carl Fehrle Presiding

Knowledge Through Cross Fertilization

Learn Through The Experiences of Others

| Time | Activity | Leader | Room |
|---|---|---|---|
| 1:00-1:30 | Bringing Us Up-to-date<br>Evaluation of Retrieval and Field Agents | Sam Sieber | Burgandy Room |
| 1:30-3:20 | Words of Wisdom<br>"I Ain't Going to do It That Way Again."<br>"How I Managed to Reduce Pressure Without Blowing My Top."<br>"Those Days of Joy."<br>Procedure (plans) for doing project evaluation --- when Sam leaves us.<br>Some "Cloud 9's" for the next three months.<br>Noticeable Changes in Phase II | Dee Ashworth<br>Ken Lindsay<br>George Katagiri | |
| 3:20-3:30 | What's Next John? | John Coulson | |
| 3:30-3:35 | Remember Us When Your're Famous | Charles Koelling | |

Friday, October 15, 1971

Larry Hale has arranged a field experience for the field agents.

PEOPLE ATTENDING 3RD TRAINING PROGRAM

IN KANSAS CITY

OCTOBER 12-14, 1971

South Carolina

W.E. Ellis
Diana Ashworth
Eilene Folger
Ellen Tollison
Tammy Crolley
Alfonso Evans

Oregon

George Katagiri
Jack Bech
Rosie Moser
Steve Stivers
Rob Fussell
Michael Call

Utah

Ken Lindsay
Kathleen Wallentine
Norm Kohler
Ruth Nielsen
Jerry Hawley
Dave Chruch

University of Missouri

Larry Hale
Randel Price
Bill Hoff
Glenn White
Charles Koelling
Carl Fehrle
Herbert Lionberger

Washington, D.C.

John Coulson
Richard Elmendorf
John Newfield

Columbia University

Sam Sieber
Karen Louis
Loya Metzger

Guest Speakers

Caroline Persell
Frank Mattas
Ed Beaubier
Charles Hoover

APPENDIX R

Evaluation Submitted By Evaluation Team of Third Training Program

# A STATISTICAL EVALUATION OF THE

# KANSAS CITY TRAINING SESSIONS

# October 12 - 14, 1971

PILOT STATE DISSEMINATION PROGRAM -

U.S.O.E.

Sam D. Sieber

Mark Weiss

with the assistance of

Beth Hay

November, 1971

Bureau of Applied Social Research

Columbia University

Columbia University in the City of New York | *New York, N.Y. 10025*

BUREAU OF APPLIED SOCIAL RESEARCH 605 West 115th Street

November 11, 1971

Dr. Carl Fehrle
U 138 Clark Hall
University of Missouri
Columbia, Missouri 65201

Dear Carl:

We finally tabulated the responses of the participants in the Kansas City meetings and tried to reach a few summary conclusions on the basis of these data. You will see that I shied away from making any general judgment and instead let the numbers speak for themselves. Frankly, I'm not sure myself what the numbers say -- except there was obviously a positive shift in effectiveness between the pre-test and post-test. There is a lot of instrumentation effect from these kinds of scales, but we thought we should at least make an effort to measure the impact of the training in some quantitative form.

The participants made a number of comments about training in response to a final question, and I will send these to you as soon as we have them typed off. I suspect that these comments, as well as what we can learn by interviewing the participants, will be of more value than the mere statistics. The main problem with the numbers is that we have no comparisons -- other training programs, other sessions in the same program, etc. -- which might tell us whether the Kansas City sessions were better or worse than something else. However, several of the participants volunteered in the questionnaire that the Kansas City meeting was much better than the first training conference. In this respect, the qualitative judgments are more useful.

Thanks for sending me a copy of the goals. When we write up a complete assessment of the training, they will be very useful for focussing on particular efforts and outcomes. And thanks for a good time in Kansas City.

Sincerely,

Sam D. Sieber

The enclosed tabulations represent (1) ratings of each session according to "relevance" and "involvement" [210-213]; and (2) self-ratings of "effectiveness" before and after the Training [214]. The 9-point rating scales and instructions are included in the appendix.

## CONCLUSIONS

1. The retrieval personnel tended to rate the sessions higher on relevance than did the project directors or the field agents (7.3 versus 6.2 and 6.0, respectively). [210]

2. The project directors tended to rate the sessions lower on involvement than did the other two groups. [210]

3. Overall, involvement was rated lower than relevance by both project directors and retrieval personnel, and the same among field agents. [210]

4. The sessions rated high on relevance (mean scores of 7-8) by project directors were:

| | |
|---|---|
| *Bringing Us Up-to-date (Sieber) | Available Resources (Hoover) |
| Goals of the NCEC (Coulson) | Using Guidelines for Res. (Persell) |

Those rated high by retrieval personnel were:

| | |
|---|---|
| *Finding Solutions (White) | *Continued work on Manual (Hoff) |
| Bringing Us Up-to-date (Sieber) | Using Guidelines for Res. (Persell) |
| *Discussion (White-Persell) | Available Resources (Hoover) |
| San Mateo Project (Mattas) | |

Those rated high by field agents were:

| | |
|---|---|
| *Bringing Us Up-to-date (Sieber) | *Case Study Sharing (Hale) |
| | *Goals of the NCEC (Coulson) |

(*Sessions also rated high (7-8) on involvement)

5. Among project directors, Lindsay was most critical with mean scores of 4.5 for relevance and 3.2 for involvement [211]. Among retrieval personnel, Moser, Tollison and Wallentine were most appreciative [212]. Among field agents, there was very little variation on either dimension [213]. (One field agent has not yet returned his questionnaire on the sessions.)

6. With respect to the before-after scores [214]: field agents show a mean increment in effectiveness of 2.5 on their total needs (all needs which they listed earlier, regardless of level of importance); project directors, 1.5; and retrieval personnel 2.8. These findings comparing the three groups are consistent with their relevance scores: retrieval personnel gained most, field agents next, and project directors least.

[ ] - refers to page number in this appendix

7. In interpreting these mean increments in "effectiveness," it should be realized that a "halo effect" may have operated insofar as the participants were seeking to express their appreciation for the training team's efforts and cordiality by insuring that their "after"scores were higher than their "before" scores, the latter having been forgotten by the time of the post-test. This comment is not meant to disparage the work of the training team, but to point out a common measurement problem in before-after tests of this sort. As one field agent wrote to us about his post-test, "In re-checking the questionnaire I determined that on (four) questions I compared in terms of the Missouri Conference contribution rather than my present level of effectiveness." Another field agent has confided in our field observer that he checked his post-test questionnaire in terms of his desired level of effectiveness rather than his actual effectiveness. Thus, these statistics should not be used as the sole basis for evaluation of the training session. Our field observers have been instructed to interview the participants and report to us soon.

MEAN RATINGS OF INDIVIDUAL SESSIONS

BY ROLES

(Relevance / Involvement)

| | | Project Directors | Retrieval Staff | Field Agents |
|---|---|---|---|---|
| I.1. | "Goals of the NCEC" - Coulson | 7.3/5.0 | 6.3/4.0 | 7.6/7.4* |
| 2. | A Review of Training Plans - Fehrle | 5.5/5.0 | 6.6/4.5 | 5.6/4.8 |
| 3. | Available Resources - Hoover | 7.3/4.6 | 7.3/5.1 | 6.0/6.4 |
| 4. | San Mateo Project - Mattas | 6.6/5.3 | 7.8/5.0 | 5.6/6.4 |
| II. | Develop Checklist and Operating Manual - Hoff | | 6.8/7.6 | |
| | Case Study Sharing Session - Hale | | | 7.6/7.8 |
| | Problem Solving - Mattas | 6.0/4.3 | | |
| III.1. | Using Guidelines for Research - Persell | 7.3/5.3 | 7.5/5.3 | 6.2/6.2 |
| 2. | Utilization of Materials - Beaubier | 5.0/4.0 | 5.4/4.2 | 5.2/6.0 |
| 3. | Discussion - White-Persell | | 8.0/8.0 | |
| 4. | Discussion - Beaubier-Koelling | 6.0/6.5 | | 4.0/5.0 |
| IV. | Diffusing Information to the Client - Lionberger | 5.3/2.6 | | 4.0/3.4 |
| | Finding Solutions to Questions: Logic, Reliability-Validity, Abstracting, etc. - White | | 8.8/8.5 | |
| V. | Continue Work on Manual of Operating Procedures; Develop Written Policies - Hoff | 5.6/7.0 | 7.6/8.1 | |
| VI.1. | Bringing Us Up-to-date - Sieber | 8.0/6.6 | 8.0/4.5 | 7.8/7.6 |
| 2. | Project Director's Feedback | 6.0/6.6 | 7.1/4.5 | 6.2/6.0 |
| VII. | Field Experience | NA | NA | NA |
| | MEANS: | 6.2/5.1 | 7.3/5.7 | 6.0/6.0 |
| | N scores: | (34) | (71) | (59) |

* The first figure indicates the score for "relevance" and the second for "involvement" on scales from 1 to 9.

Ratings of Each Session

(Relevance / Involvement)

| Project Directors: | | Lindsay | Katagiri | Ashworth | MEANS |
|---|---|---|---|---|---|
| Session: | I.1. | 6/2 | 7/4 | 9/9 | 7.3/5.0 |
| | 2. | 3/2 | 8/8 | NA | 5.5/5.0 |
| | 3. | 6/2 | 8/4 | 8/8 | 7.3/4.6 |
| | 4. | 4/2 | 8/6 | 8/8 | 6.6/5.3 |
| | II.1. | 3/2 | 7/5 | 8/6 | 6.0/4.3 |
| | III.1. | 6/3 | 8/7 | 8/6 | 7.3/5.3 |
| | 2. | 3/2 | NA | 7/6 | 5.0/4.0 |
| | 3. | 5/6 | NA | 7/7 | 6.0/6.5 |
| | IV.1. | 3/2 | 6/3 | 7/3 | 5.3/2.6 |
| | V.1. | 4/8 | 8/8 | 5/5 | 5.6/7.0 |
| | VI.1. | 8/5 | 8/7 | 8/8 | 8.0/6.6 |
| | 2. | 3/3 | 6/8 | 9/9 | 6.0/6.6 |
| | MEAN: | 4.5/3.25 | 7.4/6.0 | 7.6/6.8 | 6.2/5.1 (34 scores) |

Sessions:

I.1. "Goals of the N.C.E.C." - John Coulson
2. A Review of the Training Plans - Carl C. Fehrle
3. Available Resources
4. San Mateo Project - Frank Mattas

II.1. Porblem solving - Frank Mattas

III.1. Using Guidelines for Research - Caroline Persell
2. Utilization of Materials - Ed Beaubier
3. Discussion session - Beaubier & Koelling

IV.1. Diffusing Information to the Client - Herbert F. Lionberger

V.1. Continue Work on Manual of Operating Procedures; Develop Written Policies - Bill Hoff

VI.1. Bringing Us Up-to-date - Sam D. Sieber
2. Project Directors' Feedback

## Ratings of Each Session

(Relevance / Involvement)

| Retrieval: | Wallentine | Bech | Call | Moser | Folger | Tollison | MEANS: |
|---|---|---|---|---|---|---|---|
| Session: | | | | | | | |
| I.1. | 7/7* | 5/2 | 7/2 | 7/7 | 5/1 | 7/5 | 6.3/4.0* |
| 2. | 7/7 | 5/1 | 7/3 | 8/8 | 5/3 | 8/5 | 6.6/4.5 |
| 3. | 8/8 | 7/2 | 6/6 | 8/8 | 7/2 | 8/5 | 7.3/5.1 |
| 4. | 8/8 | 8/3 | 5/3 | 9/8 | 8/3 | 9/5 | 7.8/5.0 |
| II.1. | 7/7 | 6/7 | 4/6 | 9/9 | 7/8 | 8/9 | 6.8/7.6 |
| III.1. | 7/7 | 6/2 | 7/3 | 9/9 | 7/3 | 9/8 | 7.5/5.3 |
| 2. | 6/6 | 3/3 | 4/2 | 6/5 | NA | 8/5 | 5.4/4.2 |
| 3. | 7/7 | 9/9 | 7/7 | 9/9 | 7/7 | 9/9 | 8.0/8.0 |
| IV.1. | 8/8 | 9/9 | 9/8 | 9/8 | 9/9 | 9/9 | 8.8/8.5 |
| V.1. | 7/7 | 7/9 | 8/8 | 9/9 | 7/7 | 8/9 | 7.6/8.1 |
| VI.1. | 8/8 | 9/1 | 9/4 | 9/8 | 5/1 | 8/5 | 8.0/4.5 |
| 2. | 7/7 | 8/2 | 7/3 | 9/9 | 5/1 | 7/5 | 7.1/4.5 |
| MEAN: | 7.25/7.25 | 6.8/4.2 | 6.7/4.6 | 8.4/8.1 | 6.5/4.1 | 8.1/6.6 | 7.3/5.7 (71 scores) |

| Sessions: (Retrieval) | | | |
|---|---|---|---|
| | I.1. | "Goals of the N.C.E.C." - John Coulson | 6.3/4.0 |
| | 2. | A Review of Training Plans - Carl C. Fehrle | 6.6/4.5 |
| | 3. | Available Resources - Charles Hoover | 7.3/5.1 |
| | 4. | San Mateo Project - Frank W. Mattas | 7.8/5.0 |
| | II.1. | Develop Checklist and Operating Manual - Bill Hoff | 6.8/7.6 |
| | III.1. | Using Guidelines for Research - Caroline Persell | 7.5/5.3 |
| | 2. | Utilization of Materials - Ed Beaubier | 5.4/4.2 |
| | 3. | Discussion session - Glenn White & Caroline Persell | 8.0/8.0 |
| | IV.1. | Finding Solutions to Questions: Logic, Reliability-Validity, Abstracting, etc. - Glenn White | 8.8/8.5 |
| | V.1. | Continue Work on Manual of Operating Procedures; Develop Written Policies - Bill Hoff | 7.6/8.1 |
| | VI.1. | Bringing Us Up-to-date - Sam D.Sieber | 8.0/4.5 |
| | 2. | Project Director's Feedback | 7.1/4.5 |

* The first figure indicates the score for "relevance" and the second for "involvement" on scales from 1 to 9.

Ratings of Each Session
(Relevance / Involvement)

| Field Agents: | Kohler | Hawley | Stivers | Fussell | Crolley | Evans | MEANS |
|---|---|---|---|---|---|---|---|
| Sessions: | | | | | | | |
| I.1. | 5/4* | 8/8 | | 9/9 | 8/8 | 8/8 | 7.6/7.4* |
| 2. | 7/4 | 7/6 | | 5/5 | 4/4 | 5/5 | 5.6/4.8 |
| 3. | 6/5 | 7/7 | | 4/8 | 8/8 | 5/4 | 6.0/6.4 |
| 4. | 4/3 | 7/8 | | 2/6 | 7/7 | 8/8 | 5.6/6.4 |
| II.1. | 8/7 | 7/8 | | 9/9 | 8/9 | 6/6 | 7.6/7.8 |
| III.1. | 9/6 | 7/8 | | 2/4 | 8/8 | 5/5 | 6.2/6.2 |
| 2. | 6/5 | 8/8 | | 2/7 | 6/6 | 4/4 | 5.2/6.0 |
| 3. | 4/3 | 5/6 | | 2/7 | 5/5 | 4/4 | 4.0/5.0 |
| IV.1. | 4/4 | 4/3 | | 5/5 | 2/1 | 5/4 | 4.0/3.4 |
| V.1. | 6/6 | 4/3 | | 8/7 | 7/7 | 5/5 | 6.0/5.6 |
| VI.1. | 9/8 | 8/8 | | 9/9 | 8/8 | 5/5 | 7.8/7.6 |
| 2. | 7/7 | NA | | 5/5 | 8/7 | 5/5 | 6.2/6.0 |
| VII.1. | NA | NA | | NA | NA | NA | |
| | 6.2/5.2 | 6.5/6.6 | | 5.2/6.7 | 6.6/6.5 | 5.4/5.2 | 6.0/6.0 (59 scores) |

| Sessions: (Field Agents) | | |
|---|---|---|
| I.1. | "Goals of the N.C.E.C." - John Coulson | 7.6/7.4* |
| 2. | A Review of Training Plans - Carl C. Fehrle | 5.6/4.8 |
| 3. | Available Resources - Charles Hoover | 6.0/6.4 |
| 4. | San Mateo Project - Frank Mattas | 5.6/6.4 |
| II.1. | Case Study Sharing Session - Larry Hale | 7.6/7.8 |
| III.1. | Using Guidelines for Research - Caroline Persell | 6.2/6.2 |
| 2. | Utilization of Materials - Ed Beaubier | 5.2/6.0 |
| 3. | Discussion session - Ed Beaubier and Charles Koelling | 4.0/5.0 |
| IV.1. | "Diffusing Information to the Client" - Herbert Lionberger | 4.0/3.4 |
| V.1. | Pot-pourri - Randy Price, L. Hale, H.Lionberger, & presentation on innovation by R. Herlig | 6.0/5.6 |
| VI.1. | Bringing us Up-to-date - Sam D. Sieber | 7.8/7.6 |
| 2. | Project Director's Feedback | 6.2/6.0 |
| VII.1. | Field experience | NA |

* The first figure indicates the score for "relevance" and the second for "involvement" on scales from 1 to 9.

Tabulations for Mean Differentials for Effectiveness Ratings Before/After Training Session (K.C., Mo.)

| Field Agents: | Crolley | Evans | Stivers | Fussell | Kohler | Hawley | MEANS |
|---|---|---|---|---|---|---|---|
| Total - | 1.3 (36) | 3.0 (62) | 2.3 (15) | 3.1 (13) | 3.3 (44) | 2.2 (26) | 2.5 (6) |
| Most imp. - | 1.4 (5) | 0.8 (5) | 1.0 (2) | 5.0 (3) | 4.0 (3) | 2.0 (3) | 2.8 (6) |
| XX - | 1.5 (9) | 3.7 (4) | 3.1 (9) | 1.6 (3) | 2.2 (18) | 1.1 (7) | 2.6 (6) |
| X - | 1.2 (22) | 3.2 (53) | 1.0 (4) | 3.0 (7) | 4.2 (23) | 2.6 (16) | 3.0 (6) |

| Retrieval: | Folger | Tollison | Bech | Call | Moser | Wallentine | MEANS |
|---|---|---|---|---|---|---|---|
| Total - | | 2.1 (25) | 2.5 (52) | - | 3.3 (31) | 3.2 (36) | 2.8 (4) |
| Most imp. - | | 2.8 (5) | 1.0 (4) | 1.8 (4) | 3.2 (5) | 2.2 (5) | 2.2 (5) |
| XX - | | 2.0 (8) | 2.5 (28) | - | 3.7 (12) | 3.5 (8) | 2.9 (4) |
| X - | | 1.8 (12) | 2.8 (20) | - | 3.0 (14) | 3.4 (23) | 2.2 (4) |

| Project Directors: | Katagiri | Ashworth | Lindsay | MEANS |
|---|---|---|---|---|
| Total - | 2.6 (12) | 0.5 (26) | 1.4 (19) | 1.5 (3) |
| Most imp. - | 2.8 (4) | 0.6 (5) | 0.6 (5) | 1.3 (3) |
| XX - | - | 0.2 (4) | - | 0.2 (1) |
| X - | 2.6 (8) | 0.5 (17) | 1.6 (14) | 1.6 (3) |

RATINGS OF EACH SESSION

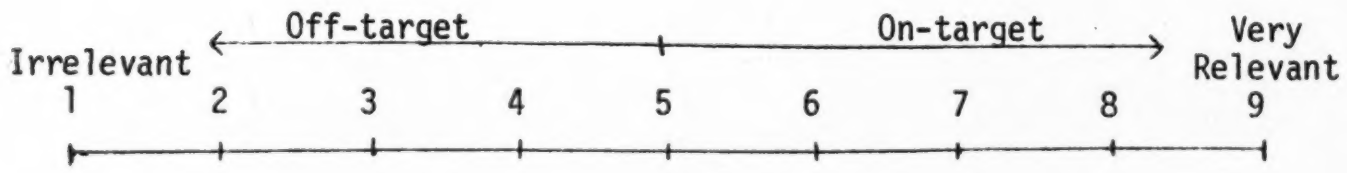
October 25, 1971

Dear

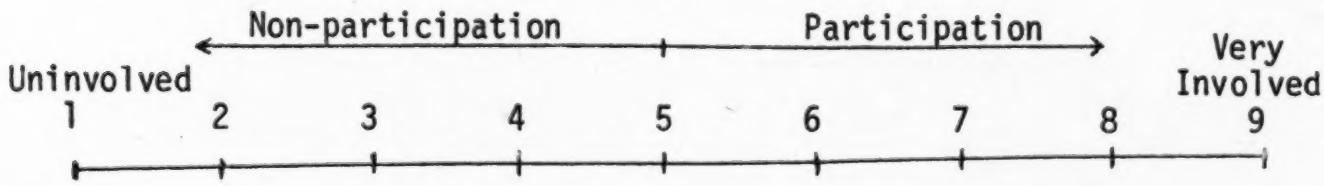
We hope you have settled back into your work and can share with us your recollections of the third training session in Kansas City. We would like to locate the strengths and weaknesses of all aspects of the program. We need to know two things:

(1) Was the presentation "on-target" - was it aimed directly at your needs or did it miss your needs?
(2) Did you feel that you were an active participant in the training process or did you feel separated from the process?

The first aspect will be represented by:




The second aspect will be represented by:




In the following listing of presentations and discussions which you attended at the training session, please indicate by circling the appropriate mark of each of the two scales how you would rate that function in terms of its (a)relevancy/irrelevancy, and whether you were (b) involved/uninvolved.

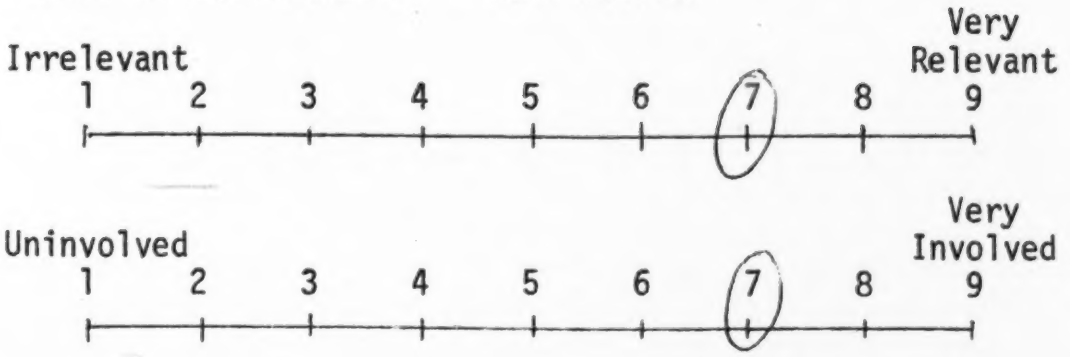
Sincerely,

Sam D. Sieber

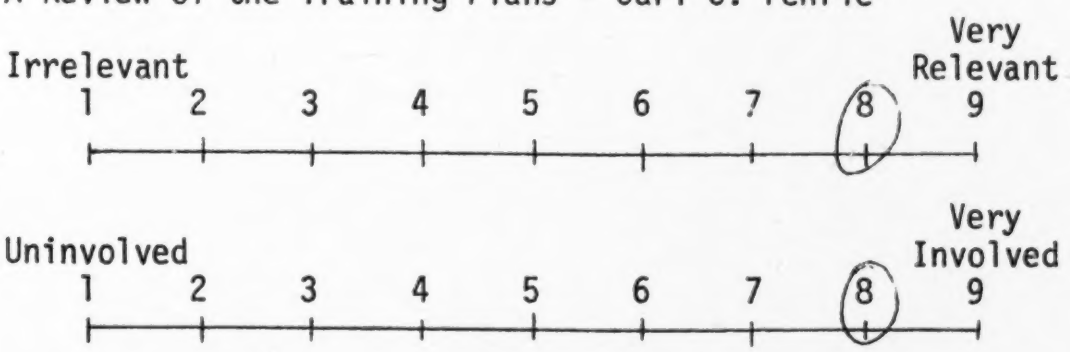
SDS:MW:bh

I. Tuesday morning.

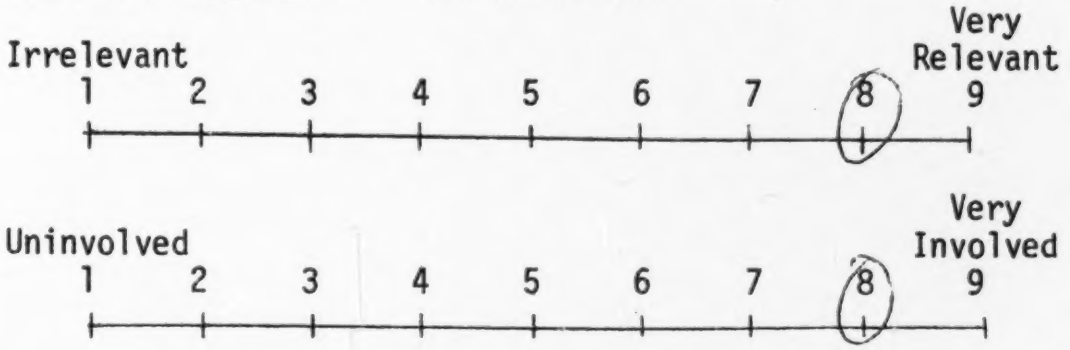
1. "Goals of the N.C.E.C." - John Coulson



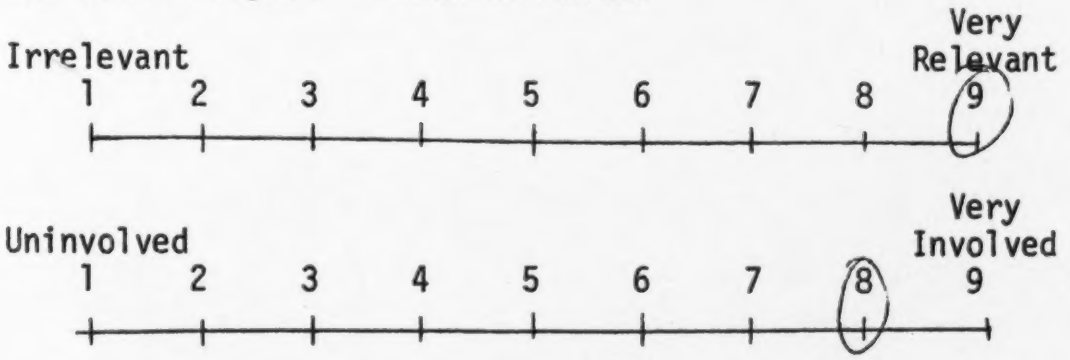

2. A Review of the Training Plans - Carl C. Fehrle




3. Available Resources - Charles Hoover




4. San Mateo Project - Frank W. Mattas



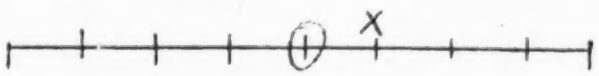

ETC.

PRE-TEST OF EFFECTIVENESS

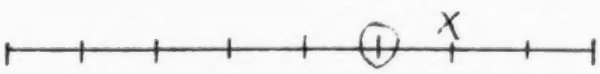
Please list below the five most important areas of expertise in which you would like to receive training assistance from this training session in order of importance. Then, on a scale of 1 to 9, rate yourself in terms of your present effectiveness in these areas by drawing a circle around the appropriate mark.

LOW 1 2 3 4 5 6 7 8 HIGH 9

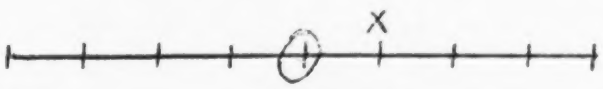
1. Information utilization, esp. conversion of data



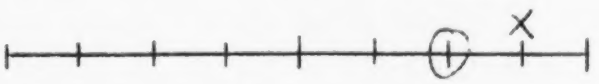
2. Length of field agents involvement in innovations



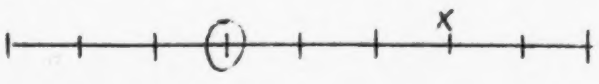
3. Instruction clients in porblem-solving techniques



4. Effective use of university consultants or SEA consultants

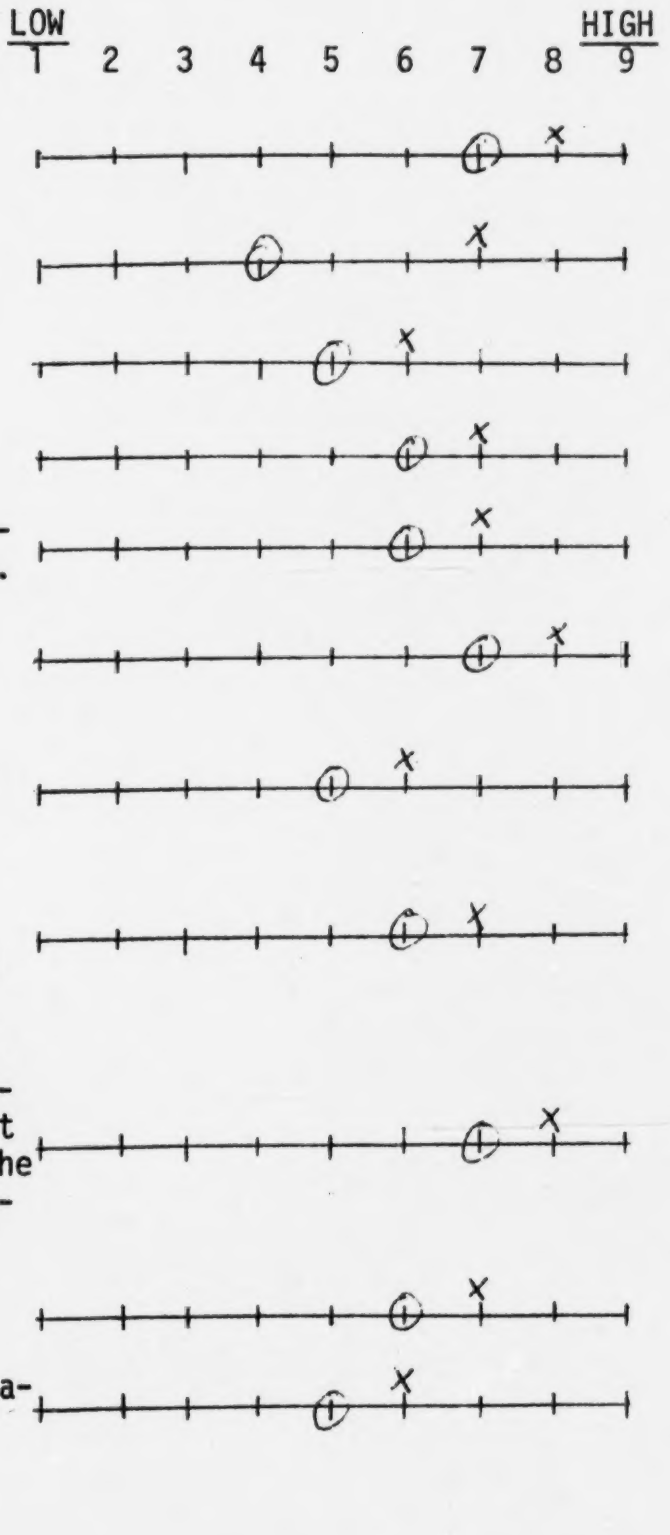


5. Adequate knowledge of other field agents' activities



Now go back and indicate with an X on each scale the level of effectiveness that you would realistically hope to attain as a result of a 3 to 4 day training program.

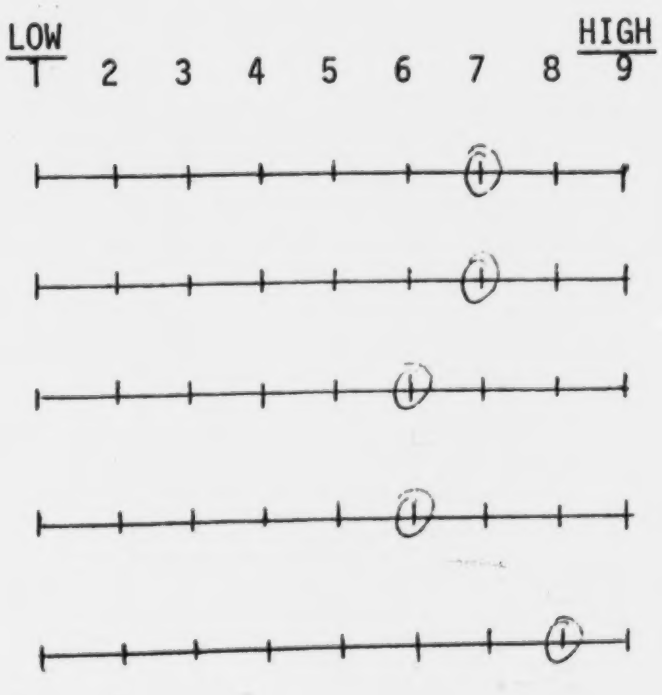
The following is a list of your own training needs as you personally indicated in a recent questionnaire sent out by the Training Team. Please rate yourself in terms of your present effectiveness in each of these areas by drawing a circle around the appropriate mark. Also, indicate with an X the level you realistically hope to attain as the result of a 3 to 4 day training program.




1. New developments or trands in education, promising practices throughout the country.
2. How field agents in other states are operating.
3. Helping clients to understand or interpret information.
4. Helping clients to select appropriate solutions.
5. Helping clients to translate research into action alternatives.
6. Motivating clients to utilize information, to try out new practices.
7. Motivating or training administrators to encourage follow-up on the part of teachers.
8. Encouraging "self-renewal" activities among the school population; institutionalizing the use of research.
9. Informing school staff throughout a target area about information that others in the district are using, that is, spreading the impact of information or innovation.
10. The strategy or philosophy of educational change.
11. Organizational barriers to educational change.

POST-TEST OF EFFECTIVENESS

Listed below are the areas of expertise which you listed, in order of importance, as most important for your own needs in training assistance at the recent training session. On a scale of 1 to 9, rate yourself in terms of what you feel to be your present effectiveness in these areas by drawing a circle around the appropriate mark.




1. Information utilization, esp. conversion of data.
2. Length of field agent involvement in innovation.
3. Instructing clients in problem-solving techniques.
4. Effective use of university consultants or SEA consultants.
5. Adequate knowledge of other field agent activities.

The following is a list of your own training needs as you personally indicated in a recent questionnaire sent out by the Training Team. Please rate yourself in terms of your present effectiveness in each of these areas by drawing a circle around the appropriate mark.

| | LOW 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | HIGH 9 |
|---|---|---|---|---|---|---|---|---|---|
| 1. New developments or trends in education, promising practices throughout the country. | | | | | | | ⊕ | | |
| 2. How field agents in other states are operating. | | | | | | | | ⊕ | |
| 3. Helping clients to understand or interpret information. | | | | | | | | ⊕ | |
| 4. Helping clients to select appropriate solutions. | | | | | | | | ⊕ | |
| 5. Helping clients to translate research into action alternatives. | | | | | | | ⊕ | | |
| 6. Motivating clients to utilize information, to try out new practices. | | | | | | | ⊕ | | |
| 7. Motivating or training administrators to encourage follow-up on the part of teachers. | | | | | | | | ⊕ | |
| 8. Encouraging "self-renewal" activities among the school population; institutionalizing the use of research. | | | | | | ⊕ | | | |
| 9. Informing school staff throughout a target area about information that others in the district are using, that it, spreading the impact of information or innovation. | | | | | | | | ⊕ | |
| 10. The strategy or philosophy of educational change. | | | | | | ⊕ | | | |

# APPENDIX S

## Comments From The Trainees Of The Third Training Program and Recommendations For Future Programs

REACTIONS OF THIRD TRAINING PROGRAM

Staff Member #1 - The third training session was the most informative session of the three. I would like to have had more input from the evaluation arm of the program (Sieber). There may have been an unstructured session to discuss loose ends. For example, I was hoping to get more information on "selective dissemination" but the opportunity did not present itself.

I think the time was utilized efficiently and what was covered was generally relevant and useful.

Staff Member #2 - I feel that many of the agents are now more sophisticated than the trainers.

I would have used a little gimmick we now use at each of our monthly meetings; i.e. each agent and Kathy and Ken and each evaluator present is given 5-10 minutes to explain a phase of their operation. Each listener is required to suggest one thing (in writing) that they have done or would do in that situation to improve the product or service. This means that each person gets 6-8 suggestions for improving their work. No pressure to accept or change but the stimulations is there. And each person must record one idea gained from each other which he or she can use to improve his performance. This means that each person goes away with 6-8 self-generated ideas for improving himself.

I think we are talking about utilization of research but see no evidence of the trainers using any data which you have generated, nor have they gathered any to serve as a basis of training needs. I think some of the things you have done could be most helpful. We have used them to good advantage.

Staff Member #3 - Problem-solving sessions with "like-types" Material prepared for the participants (state of the art papers)

educational information
consultants
information centers, etc.

Staff Member #4 -

1. More practical work sessions with people like White, Persell, and Hoff on logic writing, screening abstracts, identification of good research, etc.

2. After Sieber, session on Thursday it seems very important that retrieval people have work sessions with field agents to determine a search strategy which is tailor-made for the client.

3. I would have left the (2) Calif. presenters home. For me serving clients is gut-level work.

4. Bring computer programmers and technicians together with retrieval people for communication. This might help everyone understand the file much better.

5. I gained much more from this session than a year ago because I was better prepared by experience. Generally the session was a 6 or 7 by your scale. In my way of thinking that's not bad.

Staff Member #5 -
1. Devote half of the time spent in screening to work in logic writing.

2. Have a workshop on search strategy and search alternatives using case studies, and perhaps including procedure as used in other retrieval systems outside the field of education.

3. Organized a more detailed, orderly examination of pertinent indexes, catalogs, etc., such as "Alert," "RISE recipe box," etc.

4. A "show and tell" session--not on office forms, but rather on how the other retrieval staffs operate, step-by-step.

Staff Member #6 - I think visits to other retrieval-dissemination centers would be most helpful.

Staff Member #7 - I think I would still have Glen White do more work with us on descriptors, question negotiation, query and searching out various sources of references. We can never get too much of this.

I'd like to see a little more review of research in various areas by areas by people who work with reading, math, social studies, etc., and especially ed. administration, latest models, etc.

Staff Member #8 - As a whole, I thought the training session was a distinct improvement over the first training session in Missouri.

The one grouping, however, which has still not been achieved, and which I believe would be especially beneficial for training the retrieval staff is a group session of field agents and retrieval members for question negotiation discussion.

Staff Member #9 - I gleaned more from this training session than from the last one I attended.

A suggestion: Perhaps if trainers were more enlightened as to the peculiar operations of each project, less time could be spent explaining what we're already doing; hence, more time would be available for specific suggestions from them. For example, I found that those people involved in the retrieval process, i.e., Glenn White and Caroline Persell, were most beneficial to our needs.

Staff Member #10 - This was undoubtedly the best training session Missouri has produced.

1. My suggestion is that the more contact we can have with people of like responsibility the more we will benefit. That's why the interchange between field agents is good.

2. The presentation by Hoover, Mattas, Lionberger, Persell and Beaubier were good, but I wonder how valuable the same amount of time would have been had it been spent with "Field Agent" type people--possibly on case sutdies or in the field someplace.

Staff Member #11 - It was my impression that several of the speakers were not clearly informed as to our methods, mode, and experience obtained in the project, although when I asked Larry he seemed to indicate otherwise. I feel if that be the case then some of the speakers could have made better adjustment to their topics. Information from Dr. Caroline Persell and Dr. Sam Sieber most closely met my needs. I was unimpressed by Frank Mattas as I felt in many respects our project is far ahead of the project he represented. The Field Agent sharing session by Larry Hale was of great value. Although Dr. Lionberger's chart on variables had some value it would have been impossible to expect him to talk on each variable, and even more important on how to control such variables. This task would be well beyond anyone's capabilities.

Regarding a New Training session? Discussion of techniques of Field Agentry, Visitations to Agents, by Agents, to inspect or observe similar problems and methods of operation, more time to share experiences jointly and to look at them from all aspects, taking unitedly into consideration the positive and negative. Those that fail can also be a learning experience. We need more directed training on how do you get the client to use provided materials, and how can you, Resource Agents, set up and present alternatives to lead to directed action. Much of the training thus far has been retrieval oriented and must needs by. It may be time, now that retrieval systems are operating, to focus on the Field Agent and his problems. This is not to say that we haven't been doing it little by little. We can deliver, now, can we stimulate change. I think so; maybe we are doing it and I am slow to realize.

I think Missouri is doing a good job with a seemingly impossible task. How do you take three stated, three different programs, seven or eight different agents, each operating differently and train them? This is a real problem. I would think, maybe I don't have it so bad, after all. Hats off to Missouri.

I think, Sam, for additional training suggestions, I would have to let it smoulder, with some additional thought. My appreciation for your field tactics input. More of this is needed with suggestions on how to plan and control at each of the phases.

Staff Member #12 - To improve the third training session I would have allowed more time for the field agents to talk together. The afternoon with Larry was a good start but just not long enough. It might be well to cut down on the structured sessions and put more emphasis on the agents, project directors and retrieval people querying each other on the how, when and what of their operation.

I could be very wrong, but I feel that we could be of more help to each other than outside consultants could ever be.

I would also suggest that the field observers along with your staff, Sam, would be a valuable addition to any training effort. I know that Dr. Larson can see my needs more clearly than I. He can see it from the client's standpoint as well as the agents.

Staff Member #13 - Explore the Cognitive Affective and Psychomotor Domains through case study analysis; thus, synthesizing the role and function of each trainee in project activities.

Staff Member #14 - No answer.

# APPENDIX T

## Training and Outline of Subjects Dealt With By The Training Project

Outline of Subjects Dealt with by the Training Project

I. Dissemination and Utilization of Knowledge
  A. Models (pg. 66 obj. 2) *
    1. Concept of the change agent
      a. Process vs. product orientation
    2. Problem solving process (pg. 67 obj. 4)
  B. Situation Analysis
    1. Building relationships
      a. Conceptual
        (1) Helping clients to clarify or specify educational goals
      b. Personal - Developing rapport (pg. 68 obj. 2)
        (1) Groups
          (a) Publicity
        (2) Individuals
          (b) Threat reduction
            Threat of having to admit a problem
          (c) Contact time
          (d) Developing trust
          (e) Learning to be flexible so needs are satisfied
      c. Developing awareness
        (1) Expanding the audience
          (a) Systematic interest profile systems (data sent to interested persons unsolicited)
          (b) Motivating a clients interest in information that has not been specially requested
    2. Data collection
      a. Gaining access to key personnel
        (1) Administrators
        (2) Teachers
      b. Interviewing (pg. 68 obj. 1)
        (1) Question negotiation
        (2) Use of tapes
      c. Local practice evaluation
      d. Recording observations
      e. Developing feedback
        (1) Getting people involved
          (a) Group interviewing
        (2) Advisory committees and councils
          (a) Advantages and disadvantages
        (3) District representatives
        (4) Conducting a "needs assessment" survey

* Citations refer to the page of the proposal and the project objectives, which deal with the subject in the outline.

3. Diagnosis and the study of the situation - Interpretive schema (pg. 68 obj. 3)
    a. Community analysis (pg. 69 obj. 6)
        (1) Identification of power structures
        (2) Community barriers to change
    b. Conflict management
    c. Group processes
        (1) Leadership responsibilities
    d. Dimensions of problem solving
    e. Systems approaches
        (1) Organizationed barriers to change
        (2) Systems analysis
    f. Individual approaches
        (1) Motivational analysis
            (a) Motivating people
        (2) Psychological barriers to change
    g. Use of dissemination and change models (pg. 68 obj. 4) (pg. 69 obj. 7)
        (1) Method of recognizing change problems
        (2) Diffusion strategies and techniques
            (a) Creating and accepting change

C. Search for related information
1. Nature of research
    a. Evaluation of new educational practices
    b. Utilization of educational research
        (1) Meaning
        (2) Implications
        (3) Responsibilities involved
2. Sources of information
    a. Specialized human resources
        (1) Identifying experts and consultants in the SEA (pg. 68 obj. 8)
        (2) Identifying experts in the schools
            (a) Exemplary teachers
            (b) Administrative specialists
        (3) Identifying experts in universities and colleges
    b. ERIC
        (1) RIE
        (2) CIJE
    c. Libraries
    d. Conferences
    e. R & D Centers
    f. Regional labs
3. Information management
    a. Information retrieval and dissemination systems - components, structure, function (pg. 67 obj. 2) (pg. 68 obj. 1)
        (1) Resources needed
            (a) Adjusting systems to meet future needs
        (2) ERIC
            (a) Limitations of ERIC

(b) Operation of ERIC clearinghouses
Rationale of clearinghouse specialization
Clearinghouse overlap
Consistency of indexing practices
(3) Simplified and topical reference catalogues for use by field agents
(4) Innovative program files
(5) Local information resource systems
(6) Promising practice files
(7) Card file systems
(8) New products
(9) Standard library systems

b. Data acquisition (pg. 68 obj. 4)
(1) Design of information gathering instruments
(2) Identification of exemplary practices

c. Cataloguing and classification, files and films process (pg. 68 obj. 4)
(1) Identification (pg. 68 obj. 5)
(2) Development (pg. 68 obj. 6)
(3) Correlation with existing data systems, cross referencing
(4) Accumulation
(5) Establishing access

d. Data bank - nature

e. Information retrieval
(1) Translating problems or needs into retrievable information
(a) Coding procedures
(b) Using ERIC thesaurus
(2) Data searches (pg. 68 obj. 2)
(a) Guidelines determining the type of search to be used
(b) Computer searches
More effective coding techniques
Modifications
(c) Manual
Use of secretarial assistance
Using indexes
Available resources
Abstracts
Evaluation
Bibliography
(d) New developments or trends
New retrieval systems
(3) Relevance criteria
(4) Review of the literature

f. Data presentation (pg. 68 obj. 4)
(1) Using the ERIC printout
(2) Preparation of research reports (pg. 68 obj. 3)
(a) Guidelines for technical writing

(3) Nature of the data packages on special topics
(a) Developing packages on special topics
(b) Developing problem solving packages
(c) Packaging
(d) Hard copy costs
(4) Conduct of training programs
(a) In-service programs

D. Information modification and application
1. Data interpretation
a. Use of specialized human resources - identification, training, involvement (pg.67 obj. 3) (pg. 68 obj. 8)
2. Gaining acceptance (information dissemination)
a. Interpretive schema
(1) Social process skills (pg. 67 obj. 6)
(2) Change processes (pg. 66 obj. 2)
(a) Individuals
(b) Organizations
b. Presentation of alternatives (pg. 68 obj. 3)
c. Training clients in use of services
(1) Materials
(2) Personnel
(3) Developing interest
(4) Consensus
(5) Changing attitudes
(a) Overcoming negative attitudes
(6) Using educational technology in disseminating information directly to the schools
(7) Using intermediate agencies
(8) Making ed. research more relevant
(9) Response time
d. Functioning as a catalyst (pg. 68 obj. 4)
(1) Involvement vs. non-involvement
e. Communication skills (pg. 67 obj. 5)
f. Implementation
(1) Interpretive schema
(a) Group dynamics
(b) Human behavior and its modification
(2) Obstructions (pg. 67 obj. 9)
(3) Use of specialists
(4) Helping clients to understand or interpret information
(5) Helping clients to translate research into action alternatives
(6) Helping clients to select appropriate solutions
(7) Motivating a client to try out new practices
(8) Helping clients with installation of innovations
(9) Involving more people
(10) Publicizing innovative practices
(a) Improving communication between schools
(11) Improving school-community relations

(12) Mediating local disputes
(13) Maintaining impetus for change

g. Reinforcement
(1) Who gets the credit for change
(2) Motivating administrators to encourage follow-up by teachers

h. Stabilizing innovation
(1) Encouraging "self-renewal" activities
(2) Institutionalizing the use of research
(3) Field agent detachment

E. Effect evaluation (see under dissemination organization accountability)

II. Nature of Education
A. Educational Organization (pg. 67 obj. 8)
1. National
2. State
3. Local
4. Organization developments

B. Role of education strategy or philosophy of educational innovation.
1. "Systems" approach to educational improvement

C. Education technology (pg. 68 obj. 5)
1. Modular scheduling
2. Individually prescribed instruction
3. Team teaching
4. Autotutorial instruction
5. Interaction analysis
6. Use of non-verbal behavior
7. Operant conditioning

III. Dissemination Organization
A. Personnel management
1. Interpretive schema
a. Systems design (pg. 66 obj. 1)
b. Group processes
(1) Teamwork (pg. 67 obj. 3)
c. Bureaucracy, theory and practice
d. Individual processes
(1) Motivation and attitudes
e. Project proposals and development
(1) History of the project

2. Planning (pg. 67 obj. 10)
a. Deliberate change system models
b. Development of alternative component factors
c. Implementation
d. Assessment
e. Objective development
(1) Goals of the project
(2) Goals of the state
(3) Goals of the Nation
(4) Personal goals
f. Priority development
(1) Consolidation

(2) Individual decision
(3) Allocation resources on a cost-probable benefit ratio (pg. 67 obj. 6)

3. Establishing the clientele
4. Role development
   a. Clarification
      (1) Setting parameters for self and client, adjustment of expectations relation to change theory
      (2) Change agent role adapted to field and retrieval staff
   b. Supervision
      (1) Developing a power base
      (2) Responsibility and authority
         (a) Relation to change theory
            Responsibility of the retrieval center to interpret ed. research
         (b) Use of secretaries and other sub-professionals in the search and dissemination process (pg. 68 obj. 7)
      (3) Staffing
   c. Identifying limitations
   d. Work breakdown structure
   e. Network development
   f. Overload and over-run
   g. Expansion of services
5. Procedural development
   a. Decision making processes
   b. Channeling of contacts
   c. Flow processes
   d. Cooperation
      (1) USOE expectation relation to other activities of working with USOE
      (2) Working with state department
      (3) Objectives
      (4) Directives
      (5) Other divisions of the SEA
         (a) Specialists
      (6) Installing the information system as a permanent state
      (7) Function
      (8) Improving service to SEA
   e. Working with local organizations
      (1) Relationship of the project ot the target clientele, how improved
      (2) Communicating the priorities of the SEA or project to the local schools
      (3) Involving more schools in the project
   f. Developing close working relationship among staff
6. Communications
   a. Staff meetings
   b. Inter-staff
   c. Committees

d. Reports and record keeping
(1) Forms

7. Accountability (evaluation) (pg. 67 obj. 5)
(pg. 67 obj. 7)
a. Employee
b. Product
(1) Cost reductions
c. Process
(1) Time studies
(a) Turn around time
(2) Program monitoring
(a) Analysis of the monitoring system
(3) Service evaluation
d. Effect
(1) Comparison of successful and unsuccessful modes of implementation across projects
(2) Impact evaluation, stages and levels
(3) Does utilization of research make a difference
e. Report forms and record keeping

8. Employee training and development
a. Direct observation of working situation
(1) General office procedures
(2) Work flow
(3) Division of labor
(4) Filing systems
b. Case development and analysis
c. Role playing
d. Training packages
(1) Organizational
(2) Autotutorial
e. Methods to increase working knowledge of new developments in education
f. Project comparisons
g. Setting up a training program
h. Discussion with experienced personnel
i. Participation training

B. Physical management (pg. 67 obj. 1)
1. Budget
a. Bookkeeping
(1) Accounts receivable/payable
b. Availability of federal or other funds
2. Reproduction and duplication of information
a. Information needed on hand
(1) Employee reference
(2) Immediate feedback

APPENDIX U

Project Log of The Activities of The Pilot Training Program

Project Log of the Activities of the Pilot
Training Program

6/22/70 Date the University of Missouri was notified that its proposal had been accepted.

7/24/70 Advisory Committee, Columbia, Missouri
Introduction of the proposal to the Advisory Committee. Review of the proposal and discussion of the project. (Step #1 of the proposal)

8/12/70-8/13/70 Organizational Meeting, Columbia, Missouri, held to review funded proposal and get acquainted. Attended by representatives from each project, Columbia University, USOE and University of Missouri-Columbia.

8/26/70 Overview for first training session sent to USOE.

8/31/70 First site visit to Utah, (Heber, Salt Lake City). William Hoff, Larry Hale, and Carl Fehrle, the training team, visited an intermediate center, the retrieval center in the state office, field agents, the writer of the state dissemination project proposal, and the assistant state superintendent. The evaluation team member was present. (Step 2 of the proposal)

9/21/70 Trainees were asked through correspondence to familiarize themselves with 4 books and 4 reports.

9/23/70 Advisory Council Meeting - Columbia, Missouri
The training team reported on its experience in Utah and discussed results of the organizational meeting, August 13 and 14, delays caused by unhired dissemination project staff, films previewed for showing, and other aspects of 1st training program. (Step 3 of the proposal)

9/29/70-10/1/70 First site visit to South Carolina (Columbia, Charleston, Rockhill) - Charles Koelling, Glenn White, Carl Fehrle represented the training project. Training team visited the retrieval center, the South Carolina project advisory committee, several state consultants, and four school administrators from the target areas, a secondary and an elementary school in session, and toured two school buildings. The training team worked with the retrieval staff and the field agents. (Step 2 of the proposal)

10/2/70 Tentative program for 1st training session sent to USOE.

10/5/70- First site meeting to Oregon, (Salem, Eugene, and Pendleton) - Randel Price, Daniel Doell, and Carl Fehrle served as trainers. The training team visited with the project

director and the state board of education, Oregon Total Information System, several target superintendents, and a school in the general area. Training team visited the Intermediate Educational Center with its superintendent and the observer for the evaluation project. (Step 2 of the proposal)

10/13/70 — Advisory committee meeting, Columbia, Missouri
Overview of training session

10/19/70-10/22/70 — First training session, Columbia, Missouri
Of the 50 or so hours of available time during the 5 day training period, 10 1/2 were spent in directed lecture sessions, 2 in directed (optional) film sessions, 5 3/4 in discussion, and 12 1/2 in directed learning activities. Approximately 20 hours were available for self-development. Twenty-eight and one-half hours spent by 13 trainers and resource persons. A total of 15 days were spent by 3 trainers and administrators. Participants are listed in Appendix C. Special arrangements included separate programs, including ample overlap, for field agents and retrieval staff; a field trip to the SEA computer center in Jefferson City; a reference book and tape display; a banquet; and reports by the project directors of each state dissmeination project.

10/23/70 — Advisory committee meeting - Columbia, Missouri
Reviewed evaluation of 1st pilot training program. The questionnaire for project director, retrieval staff, and field agents was discussed.

12/21/71 — Tentative decision was made, based upon results of the questionnaire for the evaluation of the 1st training session, to hold the 2nd training session in each state following the site visit. (Step 5 of the proposal)

1/7/71 — Training project director requested of USOE that the training program be changed to training on site.

1/12/71 — USOE approves the request that 2nd training session be on site.

1/23/71 — Charles Koelling and Carl Fehrle attend a workshop in Chicago on group approaches to change, conducted by the Alfred Adler Institute.

1/25/71 — Second site visit to Utah, (Cedar City, Heber, Richfield)
Three University of Missouri trainers, Larry Hale, William Hoff, Carl Fehrle, spent about 4 1/2 days each visiting, observing, counseling, and conducting on the spot training. The trainers took one retrieval person with them and spent three days in the field reviewing the work of the field agents and training their secretaries. One evening was

spent discussing problems and planning the training program. The group visited the retrieval center and conferenced the project director. (Step 7 of the proposal)

2/8/71 — Glenn White visited Salt Lake City, Utah, and assisted the retrieval person with the design of a questionnaire.

2/8/71 — Second site visits Oregon, (Eugene, Portland, Salem) - 3 days of on site observation, visitation and planning by the trainers, Carl Fehrle, Charles Koelling, Randel Price, Bill Hoff, and Glenn White.
The field agents and retrieval staff were counseled in depth. The evaluation project observer was visited.
The training team visited a school, two school officials, and a superintendent. They attended an administrative meeting that discussed a joint program. Later the training team reviewed the training program for the training session. (Step 7 of the proposal)

2/1/71-
2/12/71 — Second training session in Portland, Oregon.
After the site visit the staff was assembled and involved in approximately 12 hours of planned presentation including discussion and case studies by the four trainers, over the two day period.

3/2/71-
3/3/71 — Second training session, Salt Lake City, Utah
A program of about 16 hours including presentations, discussions, and role playing was developed involving 3 trainers from the University of Missouri, Bill Hoff, Carl C. Fehrle, and Larry Hale, 15 state technical assistants and three superintendents who had had some involvement with the project.

3/28/71-
3/30/71-
3/31/71 — Second site visit to South Carolina (Rock Hill, Charleston, and Columbia). University of Missouri trainers, Charles Koelling, Randel Price, Carl Fehrle, Paul King, and Bill Hoff, spent approximately 2 1/2 days each. The training team discussed the progress of the project with the field agents and retrieval staff. They accompanied the field agents as they visited several schools. The training team visited with the principal and several staff members about a learning resource center in their junior high. They visited the central office and retrieval center and held a team meeting to finalize training program plans. (Step 7 of the proposal)

4/1/71 — Second training session, Columbia, South Carolina.
The trainers visiting the site presented the program to the collected staff. Thirteen hours were spent in directed presentations, discussion, sensitivity training, and case studies presented by the field staff.

| | |
|---|---|
| 5/24/71 | Project directors' meeting - Chicago. Project directors and evaluation team representatives and USOE. Status reporting session, discussed third training session, evaluation team would prepare a list of specific needs, send to training team for refinement and then send to the trainees for checking areas of concern. |
| 6/30/71-<br>7/1/71-<br>7/2/71 | Third site visit to Utah, (Heber, Salt Lake City, Logan) Charles Koelling, Larry Hale, and Bill Hoff went to Utah. Three trainers spent 3 days. They visited the field agents, one at work and the other in summer school. They visited the state board of education and retrieval staff, two state specialists in state department, and an intermediate education unit (IED). |
| 7/6/71 | Third site visit to Oregon (Pendleton, Eugene, and Salem) Three University of Missouri trainers - Larry Hale, Bill Hoff and Carl Fehrle spent 3 days each. The trainers held a workshop and discussion with the two field agents and accompanied them during their tasks. The training team visited four school buildings and four superintendents, and held several conferences with the superintendent of one of the intermediate school districts that housed one of the field agents. They met with the retrieval staff (Step 7 of the proposal) |
| 8/2/71-<br>8/4/71 | Third site visit to South Carolina (Charleston, Rockhill and Columbia). The training team included Carl Fehrle and Randel Price. They met with the communication specialists, the retrieval staff, the chief supervisor, and an SEA administrator at different times. The training staff attended a meeting of administrators and teachers initiating a detention program. An assistant superintendent of one of the target school districts was visited. They attended an administrators' meeting where one of the communication specialists explained again the dissemination program and distributed samples of the resources available. (Step 7 of the proposal) |
| 8/9/71 | Conference with the evaluation project director. Training needs were discussed in relation to evaluation project observations. |
| 9/23/71 | First September planning meeting with advisory council, Columbia, Missouri. Tentative plans for the 3rd training session were discussed. |
| 10/5/71 | Second training team meeting, Columbia, Missouri. Final planning for 3rd training session. |
| 10/12/71-<br>10/15/71 | Third training session - Kansas City, Missouri. of the approximately 31 1/2 hours available for the 3rd training program, 7 1/2 were spent in lecture, 5 3/4 in discussion, |

5 in activities and 13 1/4 in unscheduled time. Participants are indicated in Appendix C. Special arrangements included: one of the trainers spending 1/2 day with field agents on an on site visit with a change agent in the Kansas City area, a book exhibit, a banquet, and two noon luncheons. (Step 6 of the proposal)

2/15/72 Final report submitted (Step 8 of the proposal)